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Commission for International Adult Education (CIAE) of the American Association for Adult and Continuing Education (AAACE) 59th Annual Conference

CIAE Mission Statement

The commission on International Adult Education (CIAE) of the American Association for Adult and Continuing Education (AAACE) provides a forum for the discussion of international issues related to adult education in general, as well as adult education in various countries around the globe.   The following purposes summarize the work of the Commission:

- To develop linkages with adult education associations in other countries
- To encourage exchanges between AAACE and associations from other countries
- To invite conference participation and presentations by interested adult educators
- around the world
- To discuss how adult educators from AAACE and other nations may cooperate on projects of mutual interest and benefit to those we serve

The Commission holds its annual meeting in conjunction with the AAACE conference.

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CHALLENGES FOR COMMUNITY WORKERS' TRAINING AND PROFESSIONAL DEVELOPMENT: THE NIGERIAN CASE

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ABSTRACT: Cases abound of community projects abandoned due to community members' lacking professional guidance in the initiation and implementation stages of community development projects. In order to unravel the problem, the Federal Ministry of Health and Human Services, Community Development, in 1992, prepared curricula for the training of community development workers in the federation. This paper assesses the impact of the training programmes on the professional development of community workers in Oyo State, Nigeria. Participants in the study consisted of trainees, trainers, sponsors and community leaders. The study, through trained interviewers, employed an in-depth interview method in eliciting information. Secondary data such as documents, curricula, Government records were also used in the study. Analysis of data was carried out using qualitative methods. Findings revealed that community development has been adopted in Nigeria as a veritable instrument for achieving national development. The study also revealed that the curriculum content of the training courses was relevant to the community development objectives in the social development policy for Nigeria and that participatory techniques adopted were suitable for the training programme.

Introduction

Community development is a profession. Accordingly, those who practice the profession should possess certain associated knowledge and skills. In its broadest sense, community development is simply one aspect of socialization. It involves the acquisition of knowledge and the learning of skills. According to Durkheim (quoted in Haralambos & Holborn, 2004), education teaches individuals specific skills necessary for their future occupations. Admittedly, the inter-dependence of specialized skills is underscored in community development. Some of these skills, according to Fasokun (2002), include production skills, support and maintenance skills, planning and adaptation skills and managerial skills. The implication is that the skills needed in the workplace will depend on some factors such as job functions and tasks of the employees, the management philosophy and the changing job requirements (Fasokun, 2002). Community work, in different forms, is a practical art. Therefore, community workers need to update their knowledge and skills in various areas, positions or tasks in order to achieve desired outcomes.

One overriding problem, however, is that there is a dearth of community development professionals in Nigeria. This situation suggests that many people who find themselves professionally responsible for community development are without any appreciable training directly related to the profession. Fasokun observed that people are engaged in the adult education profession generally as adult educators, teachers, andragogues, trainers, facilitators, community workers, human resource officers, literacy teachers and workplace instructors have received training in other disciplines, but without specific preparation for the profession of adult education (Fasokun 2002). Such a situation, as it

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were, has often meant that additional training and knowledge were acquired through formalized programmes or through intensive self-study efforts.

Specifically, lack of community development workers' enlightenment and skills constitutes a major problem. In this regard, they are not sufficiently prepared to assist their client community members to surmount their numerous problems. Consequently, there are incessant cases of community development projects being abandoned or becoming counter-productive: community conflicts often have resulted in mass killings, apathy of community members to self-help development projects/programmes and absence of clarity of community development programme design and implementation. It is important, therefore, that the few practitioners in the community development profession and new entrants should be well grounded in the rudiments of the profession.

In view of the above, in 1992, the Federal Ministry of Health and Human Services, Community Development Department, Nigeria organized training programmes for the professional development of community development officers in the Federation. This was a realization of the dearth of community development professionals. The one-month training course was organized for different categories of community development workers.

The aim of this paper is to assess the impact of the training programmes on the professional development of community development workers in Nigeria and highlight challenges facing such training programmes. An ancillary aim is to underscore modern demands on the provision of continuing education for community development workers through different training courses, seminars, workshops, conferences, action research and web-based learning. In order to achieve the aims of this study, an attempt was made to examine both past and present initiatives to enhance training and professional development of these professionals, identifying constraints, and making recommendations for further professional development. It is also hoped that access to this knowledge will enhance the capacity of community development workers and officers in the performance of their various responsibilities.

Conceptual Clarification

Professionalism

The attempt to define the term ―professional development" will necessitate a review of the words, ―professions," ―professional," and professionalism." According to Sherman, Kutner, Tibbetts, and Weidler (2000) cited in Fasokun (2006) the term ―professions" means those occupations such as law, medicine and teaching that require considerable training and specialized study. In this regard, a member of a profession is termed a ―professional." ―Professionalism" refers to a professional's qualities and characteristics, including self-responsibility, expertise, special skills and ethical behavior.

Hence, community members through the professional expertise of the community development workers can reach understanding among themselves and thereby be able to

combine and plan effectively for the solution of their common problems. Therefore, professional development is involved in the whole process of the community development workers making a continuing effort to enable the people to grow aware of needs, perhaps not initially felt, and then to assist them to acquire the organization and the skills needed to satisfy their needs.

Professionalism is involved as an important factor in every community development activity. When, for example, a community development worker and an illiterate community member meet each other and interact in such a way that the illiterate community member can come away with more knowledge than he/she had before approaching the situation, it can be said that he/she has started to benefit from the process of professionalism.

The Concept of Training

The term ―training" enjoys a variety of definitions. According to Mathis (2000), training comprises those activities that are designed to improve performance on the job the employee is presently doing or is being hired to do. He further stresses that the purpose of training is to either introduce a new behavior or modify the existing behaviours so that a particular and specified kind of behavior results. Similarly, Williams (1978)--cited in Ajayi (2008)--defines training as a process of applying appropriate educational methodology to those situations in which improved performance can result from effective learning. In this way, the trainee as a result of training is able to respond adequately and appropriately to some expected and typical situations. Often training addresses itself to improving performance in direct dealing with things. This corroborates the view of Ologunde (2007) that training increases the level of individual and organizational competence, since it continually improves workers' skills, quality, productivity and hence, profitability.

For further clarification, it is important to draw a distinction between training and education. Ajayi (2008) distinguishes between education and training and delineates two differences. By looking into the difference and the meeting point of training and education, education is perceived as the development of the mind, and it promotes an increase in the power of observing, analysis, integration, understudy and decision–making. Training, however, is concerned with those activities which are designed to improve the performance of individuals on the job they are hired to do or being prepared for either as a job or new procedure or process.

Inferred from the above mentioned point, training for community development workers in this regard is not just cramming of facts about the concepts of community, community mobilization, leadership, methods and information about community development. Training for community development workers in this regard includes interaction with community members in the real situation where his/her knowledge skills and expertise as community development worker are applied for desired results and outputs – change for better living. This explains the fact that training for community development workers has

to be frequently participatory, generally dialogic, typically holistic in form and process, and usually guided by the ethical concerns of society.

Research Design

Research Questions

The study was guided by the following research questions:
1) What are the basic philosophy and objectives of community development in the social development policy for Nigeria?
2) Are the curriculum contents of the training course geared towards achieving the community development objectives in the social development policy for Nigeria?
3) What training techniques are commonly used by the trainer?
4) How do trainees, trainers, sponsors and community leaders perceive the impact of community workers' training and professional development programme on community development projects/programmes?
5) What are the challenges facing the community development workers' training and professional development programmes in Nigeria?

Method, Participants, and Data Sources

A case study research approach was adopted. The participants were trainees, trainers, sponsors and community leaders. Data for this study were collected from a variety of sources. The study employed the depth interview method in eliciting information from trainees, trainers, sponsors and community leaders. Secondary data used for analysis were obtained from programme documents, curricula, Government records from the Community Development Division of Oyo State Ministry of Women Affairs and Community Development.

Sample Selection and Techniques of Data Analysis

Of the 36 States and Federal Capital Territories in Nigeria, Oyo State was selected for this study, being the state of origin of the researcher and for the sake of convenience.

Oyo State is divided into three Senatorial Districts: Oyo North, Oyo Central and Oyo south. Each of these three Senatorial Districts situates a community Development Zonal Department where training is being conducted for the community development workers. From each zonal community development department, 50 trainees, 5 trainers and 5 community leaders were randomly selected for the study with Deputy Director (Community Development) from each zone bringing the total participants in the study to 183 (see Figure 1). The analysis of data was carried out by the use of qualitative methods.

Findings

Research Question 1:
What are the basic philosophy and objectives of community development in the social development policy for Nigeria?

According to the Social Development Policy for Nigeria (1989), the basic philosophy is the recognition of community development as a veritable instrument for achieving national development. Its programmes help to realize the potential of the people since change and development ensures active involvement and participation of the people in the planning and implementation of development projects.

In formulating this policy, the greatest weight was given to the right of choice, to self-respect and dignity, and to consultation and communal living which are cherished values of the Nigerian society.

In the execution of this policy, therefore, due emphasis shall be placed on the felt needs and aspirations of the people, consultation with them and their involvement in all facets of Community Development and Social mobilization activities.

The main objectives are to:

1. Establish an organized system of social services in order to make people self-reliant and able to participate fully in the development of the nation; and
2. Ensure that the communities are fully integrated into the life of the nation through specific community development programmes.

The basic philosophy and objectives of community development, entrenched in social development policy, reveals that efforts of the people themselves are united with those of the governmental authorities to improve the economic, social, and cultural conditions of the people. This scenario places community development and its practitioners in high esteem. In this regard, the importance of training and professional development to enhance community development practitioners' effectiveness, competency and productivity cannot be over-emphasised.

Research Questions 2:
Are the curricula contents of the training course geared towards achieving the community development objectives in the social development policy for Nigeria?

A critical analysis of curricula for the training of community development workers reveals that important issues in the policy are taken into consideration.

This is evidenced in the training course for frontline /village-based community development workers (Anyanwu, 1992; Curricula for the Training of Community Development Officers in the Federation, 1992). The training course covered some key issues in community development. These included:

- Principles and Practice of Community Development
- Programmes and Projects
- Mobilization Strategies for Community Development
- Planning, Research and Statistics
- Constraints in Community Development

It is evident that the design of this curriculum has been guided by the policy of the government regarding rural and urban development, and the significance of what community development can be achieving through fostering this policy.

Research Question 3:
What training techniques are commonly used by the trainers?

Responses from the trainers and trainees revealed that participatory training techniques were commonly used for the community development workers' training and professional development. Adopting participatory techniques in the training course, the trainees were able to contribute actively to the learning process. Participatory learning in this respect both encouraged the growth of self-confidence among the trainees and helped the transfer of learning as a potential source of empowerment for local communities.

According to Anyanwu (1992), participatory technique prepares the trainees to encourage the client community members to participate at every stage of the planning and execution of community development programmes or projects. Using participatory techniques in this way makes the community development workers see their work as a challenge to be approached with a deep sense of responsibility.

Research Question 4
How do trainees, trainers, sponsors and community leaders perceive the impact of community workers' training and professional development programme on community development projects/ programmes?

Trainees, trainers, sponsors and community leaders perceived the training programme to be effective and relevant to community development projects/programmes. Community development workers through their training have acquired high qualities of tact, judgment, restraint and patience in their work with local communities. Their training, therefore, equips them with the skills and aptitudes needed for their work. For example, through training, the community development workers are given a content of knowledge of community development which they transmit to their client community. In addition, their training has encouraged them to encourage local initiative as well as motivating the people to organize group actions in community development. The training also afforded them to respect the customs, traditions, cultures, beliefs and organization of their client communities.

Community development workers are now realizing the importance of training in enhancing their competency and effectiveness in their profession.

Research Question 5
What are the challenges facing the community development workers' training and professional development programmes in Nigeria?

Numerous challenges facing the community development workers' training and professional development were identified in the study. Respondents unanimously identified the lack of a Centre for Community Development Education (CCDE) as a place specifically designated for the training as an obvious impediment. The places commonly used at present for the training are being used for other purposes such as community meetings or administrative matters. More often than not, there are clashes between different users of the place. Such a situation usually has unpleasant side effects on the training programme.

A dearth of well-stocked community libraries is perhaps the most serious shortage problem facing the training programmes. Consequently trainees, trainers, community leaders and members do not have access to information that could be useful and relevant to the training. It is on this note that Mchombu and Cadbury (2006) reiterate that the rural libraries are used as a mobilization tool to stimulate and steer the overall development of the community. Rural community libraries according to Aboyade (1987) and Mchombu (2003) have always been a source of key development information.

Recommendations

In view of the importance of community development workers' training and professional development, the following recommendations are made:
1) Establishment of a Centre for Community Development Education in every local government headquarters
2) Establishment of community libraries and information resource centres
3) Adequate funding of community development workers' training programmes
4) Policy and political support of training and development for community development workers
5) Steps should be taken to ―sell" the credibility of the diploma and certificate awarded to the trained community development workers for further academic pursuits
6) Recognition of the roles of community leaders in the training programmes

Conclusion

Efforts have been made in this study to underscore the need to promote community development workers' training and professional development in Nigeria. Obviously, there are many challenges facing rural communities in Nigeria such as rapid population growth, environmental poverty, declining quality of life, lack of infrastructural facilities, flooding, desert encroachment, rural–urban migration, lack of social amenities in the rural areas, mass illiteracy, and wide-spread fear of killer diseases such as HIV/AIDS. The Nigerian perspective, according to Anyanwu (1992), is that these complex problems cannot be satisfactorily addressed only by direct delivery of services by government. The

community development strategy has to be adopted and emphasized. The community development workers, therefore, must be trained to work in collaboration with the client community leaders and members in surmounting the problems.

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ADULT EDUCATIONAL AND MORAL POWERS OF WOMEN IN INDIGENOUS AFRICA

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ABSTRACT: Women of different ages and calling had many powers in the traditional and pre-colonial African community. Those powers permeated all aspects of life in the community but were mostly associated with education and religious rites because of the interconnectedness of everything with education and religion. Almost all social, religious, educational, and even economic institutions dovetailed within the complex traditional society where living and learning were synonymous. This paper focuses on the Ogu and Yoruba traditional communities of West Africa where women had absolute rites and related powers in several of the institutions of their respective communities. Using the author's knowledge and experience in addition to the works of other African writers, this paper explores the adult educational, moral, religious, and related powers of women in indigenous Africa.

Introduction

One of the most problematic areas of making general statements on Africa especially in terms of values and culture is the danger of the fallacy of universal generalizations. It is difficult to generalize on Africa because of the tsunamic diversity of peoples, language, landscape, culture and values that define the continent. Avoseh (2008) affirms that the continent is ―an epitome of diversity in all ramifications of the word" (p. 194). Using sub-Saharan Africa as a referent point, Avoseh further observes that in spite of the deep and wide diversity, there are common themes of history, culture, and religion that provide logical platforms for making some universal pronouncements on Africa. Indigenous Africa is used in this paper as a synonym for traditional Africa and refers mostly to Africa prior to colonialism where life and living were governed by laws and regulations handed down from the ancestors. Pre-colonial Africa was Africa in its purest traditional state. In order to avoid making too many general statements, this paper uses examples from the Ogu (also known as Gu, Fon) and the Yoruba cultures especially those within Southwest Nigeria whose cultures and values are part of this author's existential universe. The reference to values and culture of these people is mostly within the traditional sense.

The Ogu and the Yoruba are deeply traditional people whose holistic worldviews are similar especially in terms of education, religion, morality, governance and social relations. Their worldviews are located in kinship and relating which are the foundations of all laws and regulations. The first realm of power in pre-colonial Africa was age. Age was the foremost criterion in social stratification, which was ‗unisex' in its application except in cases of blemished character or insanity. Thus, in terms of age-related power men and women had equal rights. However, in certain domains and institutions of the community, men had absolute powers while women were the reservoirs of power in other areas. Most of the institutions of power revolve around education, morality and religion as the definitions of life in traditional Africa. A good person (an active citizen) is one whose character has been shaped by education and conforms with the highest moral

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standards and values. This paper focuses on those areas where women's powers were more pronounced than men's. It also pertinent to point out that because of the seamless nature of indigenous education, it is often difficult, almost impossible to delineate different levels of education as it is done in Eurocentric education.

Life as Education

One major problem with analyzing any concept in traditional Africa is the fact that everything connects to everything else. It is impossible for instance to discuss religion without mentioning education, the ancestors and values. Discussing education on the other hand imposes the imperative of discussing the moral foundations of life and living in the community, which further implies a discussion of religious, cultural and moral dimensions of the community. The holistic understanding of life in pre-colonial Africa makes it a synonym for education, morality and religion. Because life and education were coterminous, all the values that define and regulate living in a community also drive education. Any reference to education is thus a reference to life and living in a community. The interconnectedness mentioned above also affects the basic institutions of society such that there is a juxtaposition of religious and educational institutions over which women had absolute powers. It is therefore important to highlight the importance of education in pre-colonial Africa because of its centrality to life and power in the community.

The connection between education and all sectors of society also extends to the issue of who has what power. Education was primarily about living in a community and participating in its development as a living member of the tripartite community of the unborn, the living and the ancestors. Education was also about knowing the *Osù and Èèwò* (laws and regulation but mostly the don'ts). The *Osù and Èèwò* bring a spiritual dimension to education. A violation of any of them was punished by the community and incurred the wrath of the ancestors as the divine arm of the community. Education was thus the basis of equity in the community. The whole purpose of education was to empower individuals to live the life of what the Ogu call *Medagbe* and Yoruba refer to as *Omoluabi* (an active citizen, one with a fine character). It was therefore through education that individuality was most pronounced because character was the measure of individuality and quality education. The greatest power then is the power conferred by education. As in most indigenous societies, education in traditional Africa connects the _womb to the tomb' because of its importance as the central link between the unborn, the living and the ancestors.

Lifelong learning in traditional Africa covered every facet of life and had both human and spiritual dimensions. Education generally begins at the immediate family level with the whole family being involved in early childhood education. Women (grandmothers, mothers and aunts) are, however, the foremost educators at this level where the seeds of morality, civility, respect for elders and all other seeds of good character are planted. Education grows and widens into the whole community as one grows in age. Be it at the immediate family or community levels, orality was the source of the most reliable _textbooks' of traditional education. There was heavy accent on *Orature* – the power of

the spoken word – as the medium of transmitting knowledge, values and customs handed down from the ancestors. Orature is also an avenue for creating and sharing knowledge. The oral nature of traditional education makes it ubiquitous and presents the whole community as a large classroom with learners at different levels of learning their part of the universal content, that is, life. Life in a community presents the content and context of education and imposes itself as a general requirement for all. Thus, everyone in a pre-colonial African community was given a general education. Furthermore, each individual was expected to use the opportunity of various ‗formalized‘ vocational educational ‗institutions‘ to train in specific occupations ranging from medicine, farming, music, priesthood and all other skills required for earning a living and fending for self and kin. Vocational education was generally run through the apprenticeship system. It is important to note the fact that the informal aspect of traditional education provides the foundation for vocational education. In terms of all facets of indigenous education, especially in occupational education, there was a complimentary and unambiguous parity of female and male roles in the intellectual and economic spheres of society. Sudarkasa (1982) acknowledged this parity with the argument that the positive gender parity of ―male and female occupational roles found in many indigenous economies were eroded by the spread of market economies" (p. 281). The indigenous educational system was thus one that provided access to everyone with specialization and power relative to roles and sometimes along the confines of gender. Some of the domains of power were exclusive to women but they all fall within the large umbrella of life as education. Thus, a reference to moral power is at the same time a reference to some educational power and vice versa. The same thing applies to religious and other forms of power that regulated life in the community.

Women and Power

Woman (and its plural women) is used in this paper within traditional African understanding as the feminine gender of *Homo sapiens.* Although there are several uses of the concept of power, its use in this paper is limited to its general social and religious context. In its general social context, power implies an individual‘s ability to get others to do her/his will. The ability to get others to do one‘s bidding may depend, among other factors, on trust in the person‘s ability, possession of a gift or the incumbency of an office, the ability to make things unpleasant and the possession of coercive or supernatural force. Women and the power they wielded in traditional Africa combined all the clarifications above and they derive from the traditional African worldview. The indigenous African worldview is encapsulated in religion. Mbiti (1969) affirms the all-involving role of religion in traditional Africa in his assertion that ―Religion permeates into all the departments of life so fully that it is not easy or possible always to isolate it" (p. 1). Similarly, Olajubu (2003) points out ―…religious influence in the Yoruba cosmic sphere is total as nothing lies outside the scope of religion…be it governance, economics, or medicine" (p. 2). Another African scholar contends that the keynote of the life of the Yoruba is their religion. He goes further to explain the multifarious ways of religion in the community which, he says, ―forms the themes of songs, makes topics for minstrelsy, finds vehicles in myths, folktales, proverbs and sayings, and is the basis of philosophy" (Idowu 1969, p. 5). Central to their religion is the belief in what the Ogu and the Yoruba

refer to respectively as *Gbigbono, Olodumare* (Supreme Being). The religious sphere thus provides the most source of power dating back to creation. It is believed that at creation, every individual kneels before the creator in heaven to choose her/his *hènthówà* or *àkúnlèyàn* (destiny). For the Gu, destiny is the most important link to the creator. Abiodun (1989) also affirmed that ―to the Yoruba, this choice of destiny is probably the most important in creation…and it is significant that woman has been chosen (by the Supreme Being) to handle the assignment (choice of destiny)" (p. 13). Abiodun identified Osun, the Yoruba goddess as personifying women's power over destiny. Osun is ―believed to have the power to influence the destinies of men and gods, orisa (deities), for better or for worse. Osun's presence is crucial to the sustenance of life and order on earth. She is the source of potency for most if not all male-dominated cults…" (p. 3). Woman's power over destiny is a huge moral and educational responsibility.

Associated with the ontological dimension of the power of women is the power of child-birth - ìkúnlè abiyamo – depicted by the image of the kneeling woman at child-birth. Labor pain is associated with the power women derived directly from the Supreme Being and which can be invoked when necessary. Women's power in this regard is usually depicted in the visual arts through the images of ―kneeling and breastfeeding figures… (and) reinforce the motif of motherhood as an avenue of power" (Olajubu, p. 16). The general power of motherhood and fertility of women is also personified in Osun. Osun was one of the wives of Sango a very powerful king of Oyo who was later deified as the god of thunder. Osun was also a powerful Yoruba woman who was deified because of her power and its positive impact on the community. Osun is celebrated every year at the Osun shrine by the Osun River in Oshogbo, Nigeria. The annual celebration reaffirms the moral and educational powers inherent in motherhood on the one hand and ―the creative spirit and spiritual dimension to pregnancy and childbirth" with which women are endowed and which subsist in Osun (p. 78).

Closely related to women's power of destiny and life is another metaphysical and prophetic power which derives from women's gender as females and is believed to be the basis of universal sisterhood of women who are all ―mystically linked through the menstrual blood" (p. 14). It is pertinent to note that this power contradicts women's moral powers. It must be noted that the power derived from menstrual blood is both positive and negative. The negative dimension is linked to impurity while the positive is that it is strong enough to change life itself. Hence, among the Ogu and even the Yoruba, it is osù or èèwò (taboo) for menstruating women to enter certain shrines for fear that they may pollute the shrine or that the power of their menstrual blood may clash with the power of the deity (as in connecting negative to negative). In most places, the power inherent is considered more in negative lights because it is believed to be the basis of harmful witchcraft. Indeed some see it as the foundation of evil. Mbiti for instance believes that ―those who practice witchcraft…are the very incarnation of moral evil" (p. 213). The mystic power attached to menstrual blood connects to the power of witchcraft which is an a priori power bestowed on the feminine gender by the creator. The power of witchcraft otherwise known severally as *àzétho, àjé, iya mi* cult, *ẹyẹ* (bird), *awon aiye* is one which, according to Idowu, the Yoruba believe is a ―dreadful reality" (p. 177). Using the examples of the members of Yeye Olorisha in Owo, Abiodun further gives a clearer

picture of the power of *awon aiye* thus: ―The ‗bird power' …enables women to accomplish anything that they wish. It is probably because of this power also that men fear to move too close to these cult members, as they believe that they may lose their sexual potency"(p. 3).

The holistic worldview also defines women's power in such a way that one domain of power dovetails with others. The metaphysical and ontological dimensions of women's power discussed so far fall between the moral, religious and the educational because they are lifelong powers that regulate living as learning in every community. The power of initiations is another example that falls between the domains of religious and ‗formal' adult education. The power associated with motherhood is an educational power in the sense that women (not necessarily one's direct parent) provided the initial and elementary education related to greetings, dos and don'ts, civility and general character education. Stories, songs, demonstrations and riddles dominate the content of education at this initial stage where there is no gender distinction between the learners. As individuals advance in age and qualify for age-group education and various levels of initiation, women take total control of the education of girls and young women who are ready for adult education. Although the education of boys and girls carry same level of importance, there is specific attention to the education of girls because they are the future of the primary social unit – the family. The education of girls and young women on how to sustain the values of family and clan through their role as future wives and mothers is an extremely important assignment that coffers power on women as educators and molders of moral values. The educational powers of women at this level cover a range of areas of human endeavor including the moral, cultural, spiritual, civic and social. These powers are all aimed at sustaining the community by producing individuals who are *Medagbe* and *Omoluabi* respectively. However, the educational powers increase with initiation-related and ‗formalized' aspects of indigenous education.

An example of a ‗formalized' adult education aspect of indigenous education that defines women's power is the *Dan Vòtún* of the Ogu of Southwest Nigeria. In his review of the history of adult education in traditional African Avoseh (2006) details the initiation process of new recruits for *Dan* (serpent deity) as an advanced education and religious process to train new adherents and priestesses for the deity. Trainees (*Vòtúnsi* in the making) are put in confinement for between nine months and two years. Only a select group of women handled their training because of the special powers involved. ―During their seclusion, the *Vòtúnsi* in-the-making undergo different forms of training that include language peculiar to the deity, forms of greeting, dancing steps, new spirits of commitment to other devotees and the need to pursue the finest things after graduation" (p. 9). There are other things learned and powers acquired that are not revealed to lay people. The new graduates usually had much power but their powers were nothing compared with the power of the women who trained them. Other areas of education where women had absolute powers in traditional Africa include occupational powers in midwifery and nursing.

Conclusion

This paper has focused solely on some areas of human endeavor in traditional Africa where women had moral and educational powers. The educational and other powers of women in indigenous Africa were so intertwined that one could not talk of one set of powers without reference to related powers. The interconnectedness is a reflection of the holistic worldview of the traditional African society that emphasized kinship – the core of moral obligation. Although it is difficult to set women's power domains in very neat compartments, it is an incontrovertible fact that women's powers were absolute on issues that they controlled, their powers were not token powers or honors bestowed by men. Women's power in traditional Africa is derived mainly from divine and ancestral mandates that were beyond male chauvinistic manipulations. The nature and source of women's powers in indigenous Africa could not be determined along the lines of gender relations in the linear Western thought pattern because the idea of gender parity does not make much sense in traditional Africa. Babatunde's study of women's rites versus women's rights among the Yoruba (as cited in Olajubu, p. 10) was emphatic in affirming that ―….among the Yoruba, the question to ask about the state of sexes is not which sex is dominant, but rather, over which areas do the sexes enjoy prominence." Women enjoyed prominence and had power in life-defining areas of destiny, morality, education (including adult education), procreation, religion, and related areas.

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WORLD AFFAIRS OUTREACH EDUCATION: ONE PIECE OF THE KNOWLEDGE CONSTRUCTION PROCESS

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ABSTRACT: This qualitative interpretive study explored how learners perceived they constructed knowledge in connection to their participation in three world affairs outreach programs: the changing global order, the Katyń massacre, and Russia. The study findings suggest that learning spaces, past regional experiences, and roles are central to learners' knowledge construction process. The findings contribute to our understanding of knowledge construction and constructivist learning theory and suggest a tension between the individual and the social.

Different types of education are often defined by the learning activities they encompass (Merriam, Caffarella, & Baumgartner, 2007). Outreach initiatives encompass multiple educational efforts; therefore, the cascading learning of participants is a complex realm of investigation. The purpose of this study was to explore how adult learners perceived they constructed knowledge in connection to their participation in world affairs outreach programs. This study is important because we need to develop initiatives to meet learners on their terms. We may know that 150 people attended a program on Russia, for example, but we do not know how a program is part of an individual's knowledge construction process. Learners do not participate in educational programs as empty knowledge vessels and they continue to construct knowledge when their participation in a program is over.

World affairs outreach education is a significant context to explore, particularly in the United States where a study demonstrated Americans' poor knowledge of international issues (National Geographic, 2006). As an example, more 18 – 24 year olds know where the TV show *CSI* is set than can find Iraq on a map. Knowledge of world affairs connects to global literacy, a necessary skill for the 21st century (Hytten & Bettez, 2008). Learners' self-identified ways of constructing knowledge as participants in varied formats and delivery methods may inform best practices for world affairs program planners, educators, and facilitators.

Methodology

The goal of this qualitative interpretivist study was to explore and interpret an individual's perception of events and actions (Creswell, 1998). This study focused on the question: How do learners perceive they construct knowledge as participants in world affairs outreach programs?

Using purposeful sampling, one in which individuals have experienced this central phenomenon, participants were those who had participated in at least one of three

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identified world affairs outreach programs in winter/spring 2009 (Creswell, 2005). The three identified programs are as follows:

- *Great Decisions program featuring a speaker on Russia.* 90-minute presentation and question and answer session. A visiting Russian scholar delivered a presentation focused primarily on Russia-U.S. military relations including nuclear proliferation, strategic arms reduction, and potential U.S. anti-ballistic missile systems.
- *A large public forum on the U.S. and the Changing Global Order.* Two panelists served as commentators in a moderated debate focusing on how the global order is changing, new sources of power, and the meaning of strength in a changing global order. The program was broadcast live on public radio and via the internet.
- *A film screening of Katyń* directed by Andzrej Wajda followed by a panel discussion of the historical context of events and how these events affect the geopolitical landscape. The film focused on the Soviet massacre of over 21,000 Polish military officers in WWII and the stories of the families of those officers.

Participant characteristics are noted in Tables 3 and 4. All participants were white, over the age of 40, and had at least some post-secondary education. The sample consisted of seven male and five female participants. Four participants of Polish national origin were part of the sample primarily because of the outreach education program on Katyń with a specific Polish connection. Participants were not required to give contact information or demographic data at programs, so it is unknown whether this sample is representative of those attending programs. It is known that eight out of the twelve participants indicated having participated in a program sponsored by the organization in the past. It should be noted that some participants attended more than one of the programs explored in the study which explains why the total number of participants in Table 4 may look as if it exceeds the number of individuals interviewed.

Table 3 (continued on following page)

Participant Characteristics

Participant	Gender	National Origin	Programs Attended	Prior Participation
Bob	Male	US	Russia Global Order	Yes
Clement	Male	US	Russia Global Order	Yes
Edward	Male	US	Russia Katyń	Yes
Gosia	Female	Poland	Katyń	No
Jacek	Male	Poland	Russia Katyń	Yes

Participant	Gender	National Origin	Programs Attended	Prior Participation
Katherine	Female	US	Global Order	Yes
Maggie	Female	US	Katyń	No
Marek	Male	Poland	Katyń	No
Patricia	Female	US	Global Order	Yes
Ron	Male	US	Russia Global Order	Yes
Sara	Female	US	Katyń	Yes
Tomasz	Male	Poland	Katyń	No

Table 4

Participants by gender and national origin

Program	Female	Male	Poland	U.S.
Global Order	2	3	0	5
Katyń	3	4	4	3
Russia	0	5	1	4

No one was required to attend the programs. Therefore, each individual chose to participate for various reasons. In this regard, a study participant, Clement, stated:

> In general, the organization attracts people, some for intellectual reasons, some for emotional reasons, and some for connections to the old country. For a variety of reasons it attracts these people. It's a self-selected group.

Clement's observation underscores the varied reasons participants chose to take part in world affairs outreach programs. While the sample of individuals in this study from Poland is out of the ordinary for an average program, it does represent a particular group present at any given program focused on a particular region, area, or issue who may not attend other programs.

All information was recorded using pseudonyms, rather than participants' actual names. Data were collected from twelve adult learners through one semi-structured in-depth interview for 45 to 90 minutes with each participant six to nine months after their participation in the outreach program (Rubin & Rubin, 1995). Data were gathered by audio-taping conversations in order to reference the interview for coding and analysis (Morse & Richards, 2002; Seidman, 1998). Descriptive and reflective field notes were recorded in a field log throughout the data collection process to capture thoughts or insights of the interviews (Creswell, 2005). Inductive analysis (Patton, 2002) was used to discover the themes and patterns that emerged. Topic coding by hand was used to identify and organize all themes on a topic for description, categorization, or reflection (Morse & Richards, 2002).

Findings

The following three subthemes most closely relate to world affairs outreach education settings. First, learners described movement through learning spaces as important to the knowledge construction process. Second, learners reflected on past regional experiences to construct knowledge. Third, learners connected to roles to construct knowledge.

Movement through Learning Spaces

Learners described dynamic movement through spaces as an integral part of the entire world affairs outreach education learning experience. The physical space of the outreach program and the other learning spaces in which individuals learned about the topic influenced their learning before, during, and after the program. The learners themselves also influenced the learning spaces.

Participants described learning spaces as integral to their learning and knowledge construction processes before, during, and after the program. Technology, primarily the internet, created one learning space mentioned by most participants to keep up to date on current affairs or connect with others through blogs. People and conversations also formed learning spaces in connection before, during, and after the outreach program. Some participants attended programs alone, but informally interacted with others at the program before and afterwards. Others attended with someone. During the Russia program Clement and Ron chatted from time to time to gauge each others' impressions. Edward received feedback from another participant on the phrasing of his question. Katherine's bus full of students created a dynamic learning space of conversation before and after the global order forum. Sara worked in international relief and described the Katyń program to her staff. Maggie discussed the Katyń program with friends and Clement integrated his thoughts about the Russia program in his blog. Participants continued learning in spaces formed by technology, work, and free time. These experiences intersected with the outreach experience and became a part of the knowledge construction process.

Some participants had specific reasons for wanting to participate in the outreach program in a space with others. For example, Polish born individuals discussed space as important in relation to their participation in the Katyń program. They conveyed wanting to be in the theater to see the reaction of an American audience; to share the experience with fellow Poles; to show ―respect"; and to see the film outside of the home. Gosia said she did not want to bring ―the feeling" into her house.

The space was an important influencer for other participants in different ways.
Edward recalled the sheer silence in the large space at the Katyń showing which let him know that what he was going to see was serious. He said, ―It told me something about the whole story. The whole thing was quite shocking." The silence created by participants influenced the space and in turn influenced the seriousness of the learning space. Clement recalled the ―loud grumbling" from the audience during the Russia program which added to his impression that the audience was displeased with the program.

The physical space of the Global Order program in the theater off campus was recalled as elegant. For example, Bob said that we ―couldn‘t do better‖ for a place in the city for this type of program whereas Clement said that the theater was ―a very ornate place‖ and the surroundings distracted. The theater space suggested something different to him than to Ron who said that the theater was ―a gem‖ in the city. For Clement, the theater was not a ―direct place to go and talk about serious things‖ whereas the university was. Katherine said that being in the physical space of the program was extremely important so that her students could see the city, the theater, diversity, and share a space with others discussing the same issues.

Past Regional Experience

Some participants related the content to regional experiences, but within the context of unique, personal experiences. Cultural knowledge as the ―glue‖ of the learning experience was conveyed by foreign born participants who could relate the content to their experiences in the region. For example, Jacek immediately related the speaker on Russia to the Soviet occupation of Poland and his experiences under an authoritarian system. Jacek‘s viewpoint was from the experience of being occupied whereas Clement and Ron articulated their regional experience in Russia in relation to their professions or as outsiders looking in. They highlighted their international careers as a starting point for making sense out of content.

For the Poles who attended Katyń, the program connected to their experiences in different ways. These participants did not have a utilitarian future use for the content, but they communicated that it was extremely important because it connected to their personal experiences and the memories of their family and nation. Those from Poland felt that they had unique cultural experiences to give them analytical skills of content. Although the Poles interviewed were not alive during WWII, they carried the stories of their families and they described living under an authoritarian regime. The political system in which they had lived was an important connector for them in the learning process.

The Poles who attended told powerful stories. Gosia directly related the program to her mother‘s experience in the war, particularly scenes of the families fleeing both from the Nazi‘s and from the Soviets. Her grandmother was fleeing with eight children, one of them being her mother, for days on foot. Gosia said:

> The youngest member of the family was about three years old. And the little girl, I remember from my mother‘s sayings, was asking for a piece of bread and they didn‘t have a piece of bread for her. So then she asked maybe they have a rim of the bread for her, but they didn‘t have the rim of the bread either. And then she was asking maybe there are somewhere the crumbs of the bread, and there were no crumbs of the bread.

Gosia went on to talk about how she remembered the stories of her family ―vividly‖ and recalled the illustrated memoir her mother wrote before she died. She said:

So those are the stories that are ingrained in my family's... but I believe are ingrained in most of the Polish families. We are cringing at just the talk of a war. Even though I didn't experience the war, my mother's experience, her first-hand experience is with the war [helps me] understand what war brings.

Gosia said that she felt that even though some of the participants would not have understood the intricacies of the movie because they were not raised in Poland, it raised awareness and it was important for this kind of film to be made.

Personally, Gosia could relate the film and the outreach program to class issues within her experience during communism in Poland. She said:

I'm very open to learning new things in general. But this one was a sensitive thing because it related to personal experiences of my family and my mother's family. During that pre-war era, they had to escape. She was from the family of means at the time. On the other hand, I was raised by a father who came from the population of the least means. And, he turned out to be a communist which was the door that was opening for him for the successful existence in the communistic country. So, I was having a mother of means that was looked down upon by the communist government and the father that actually rised with the communist government. It actually angers me a little bit that I was fed the information that was not complete. And I thought I'm so smart, and I just know it all. I was absorbing this information willingly, but then it turned out that the information was incomplete.

Because of her past experience and feeling betrayed by the government, a government she trusted, she felt that she always needed to know more, look things up, and challenge what was being presented, particularly what public officials said. Gosia described herself as a product of the communist system. She understood that there was controversy in the Katyń history, but she did not know much. Gosia was particularly impressed that the movie showed Polish officers, not just the common soldier.

In contrast, Jacek listened to Radio Free Europe and Marek's father was jailed for speaking his mind. Regarding the Katyń topic, Jacek said:

I knew about this topic, very well. Because I read many books about this and I watched many documentaries about this, and even as a child, I still remember how my family was listening…that in those times was illegal…they were listening to the Radio Free Europe or the Voice of America with all this illegal information. So, you know, even though I was seven, I was still getting that information, not even realizing. And, then I went to school and the teacher was telling something different about this and the kids, even amongst ourselves we were saying, _That's not true, because this is what happened.'…That made the teachers really unhappy, but the truth about the Katyń event was never falsified enough by the communist authorities in Poland. So, even if they were trying to,

you know, tell lies, the historical memories in the nation were really strong amongst those patriotic families.

For Poles, participation in the outreach program Katyń evoked memories of the communist system. Marek said:

> My mother was a daughter of a Polish officer and was one of those girls running to the Western front, away from the Russians. Her Dad was one of those Officers that got captured and he was lucky enough to run away.

Marek also said, ―My Dad was jailed for a few days just because he tried to say what was on his mind, which was not directly with the policy that was in place." Poles reflected how this movie could only have been made in a free Poland.

Another participant, Tomasz, said he had a love for history as his father, a historian, did. Tomasz, a native of Poland, came to the U.S. as a young child. He told me that his parents went to the embassy ―to sign the papers" to give him up for adoption because his aunt and his uncle were childless. I did not probe into the reasons for this situation. It could be because his father, as a historian would have no future in an occupied Poland and neither would his son. Telling about this experience was clearly painful for Tomasz. Although his father was not killed in the Katyń massacre, he said that his father could have been. As other Poles, Tomasz reflected ―on the system," or communism, with the people he attended and wanted me to know that not only Poles were there – there were those from other countries as well who could reflect on war and ―the system."

Occupational Roles

For some participants like Clement, Patricia, and Ron, past and present occupational roles as diplomats or academics were very important influencers in how they viewed world affairs program content. They felt that they had unique analytical skills to make sense of content and emphasized their careers throughout my conversations with them. They also viewed the need to detach from content. Some of their comments conveyed an intellectual understanding of ―the other" rather than empathy in conversations, for example, about the Russia program. Both Clement and Ron did not tell many ―war stories" of personal experiences despite both individuals having lived and worked in Russia. It seemed as if the detachment necessary in their occupational roles also framed the lens in which they viewed content. Clement said:

> After you've spent a lifetime wandering around the world looking at different cultures, you develop a way in which to morph yourself into other circumstances and start to think about them not only from your own perspective, but through all the other lenses that you have.

Current occupational roles, such as Sara's role in international relief and connecting families separated by war, were often described as both professional and personal interests as part of one's identity. Sara said, ―It is difficult to know what is a personal and

a professional interest…I've been doing what I've been doing for about 13 years now, so it's kind of hard to separate if it's a personal interest or it's a, ‗Oh, I should learn about that.'" She described her role in international relief, both personal and professional, as having influenced what she pulled out of the film as relevant. She reflected on experiences in Kosovo and working to reunite families separated by war.

Participants also highlighted aspects of the program related to their occupational roles, but unrelated to the program content. For example, Jacek's main purpose for participating was unrelated to his career; however, he was very critical of how one of the moderators handled questions and could relate this critique to skills he needed as a trainer in corporate environments. Katherine's experience as an educator was central to her experience at the Global Order program. I asked her when she had remembered the event over the last months. She did not reply immediately with a specific content area, but recalled an international education civic event where she looked out over the audience and thought, ‒I wonder if these people are experiencing what my students experienced." Her students had had a positive experience, which she facilitated as the educator. She was looking at educational experiences to do the same for others.

As a retired statistician and former army officer, Bob described himself as a strong supporter of the army, but very concerned about the budget. Therefore, nuclear disarmament was important to him because he saw nuclear weapons as wasteful in the defense budget. Whereas all participants seemed to receive confirmation on some beliefs from the Russia program, only Bob discussed the issues of nuclear disarmament that he pulled from the outreach program. Bob said:

> I thought that the narrow focus was good. She [the speaker] made a lot of sense. She didn't hide that she was speaking for Russia, but I thought that I learned if Russia saw these issues as important then maybe there is something we can do about it.

Other roles such as community group leader or educator also influenced knowledge construction. Jacek viewed himself as a community leader and felt a joint responsibility for the Katyń program. What he pulled out, as a critique of one of the moderators, connected to his feelings of responsibility for the content because he felt the moderator had been disrespectful to the subject matter. These personal and professional identities as well as use--what is for enrichment or professional development--were blurred.

Discussion

The findings of this study add to the literature on knowledge construction and constructivist learning theory. Constructivist learning assumes that ‒individuals assign meaning to experience and at the same time construct knowledge from experience" (Walker & Lambert, 1995, p.2). Different strands of constructivism and paradigms inform constructivist learning theories (Felix, 2005). Constructivism assumes, and this study suggests, that the learner creates new knowledge by relating a present learning experience to past learning experiences (Bruner, 1966, 1990; Dewey, 1916; 1938; Novak,

1998; Novak & Gowin, 1984; Piaget, 1972; Vygotsky, 1962). People form cognitive structures based on their perceptions in different contexts (Piaget, 1972). Learners use previous knowledge as a filter to interpret new learning experiences and then construct their own understanding of the meaning of the experience (Pratt, 2002).

The split between two strands of constructivism is often described as two major schools: cognitive constructivism associated with Piaget and social constructivism associated with Vygotsky (Felix, 2005). Within this understanding, the approach may be cognitive, examining how the learner individually makes sense out of an experience or content (Ausubel, Novak, & Hanesian, 1978; Novak & Gowin, 1984; Piaget, 1972), or social, examining the specific social and cultural context in which the learner constructs meaning socially with others (Bruner, 1966, 1990; Dewey, 1916, 1938; Vygotsky, 1962 1978). The findings of this study illustrate the tension between the two strands of constructivism. For example, this construction of knowledge takes place within individual and social contexts as illuminated by learners' movement through learning spaces, past regional experiences, and occupational roles.

Driver, Asoko, Leach, Mortimer, and Scott (1994) view the debate among constructivists about whether the learning process is primarily personal or social, also identified as individual or social, rather than cognitive and social (Steffe & Gale, 1995). Phillips (1995) views the personal and social construction of knowledge as points on a continuum rather than completely separate ideas. Within this understanding, individual constructivism focuses more on one's personal construction of knowledge. For example, as the learner comes across new knowledge, the learner considers past experiences and past knowledge to make meaning and sense out of the new experience or information. Social constructivism focuses more on community generated knowledge or the social interaction involved in knowledge creation. Within Phillips' (1995) framework, Piaget (1972) and Vygotsky (1962, 1978) both might be considered individual constructivists because they examined an individual's knowledge construction; however, Vygotsky might be considered more social than Piaget because he focuses more on the social and cultural environment's influence on the individual.

This study suggests a blending of the two paradigms may be helpful as we look at learners' knowledge construction in the realm of world affairs outreach education. Within this study's context, we may see a blending of the two paradigms (Driver, et al., 1994; Phillips, 1995; Windschitl, 2002). In other words, learners may individually construct knowledge that is ―mediated socially" (Windschitl, 2002, p. 137). Reality is constructed by the learner and personal experience is connected to and even inseparable from knowledge with the construction of knowledge taking place in unique social environments or learning spaces.

As these findings suggest, while personal experience may be collaborative, constructivism is not limited to the social, but may include the social. The participants in this study described their knowledge construction on an individual – social continuum, with the social not always involving collaborative learning within spaces, regions, and occupations. We may think of social mediation not only in relation to collaboration, but

also in connection to the material world. For example, the geopolitical environment, instant technology, and access to a role in an international career are aspects of the material world. These findings also put forward the consideration as to whether the individual – social continuum might be viewed as the tension between the learner's individual agency and the power of the environment, or more specifically the geopolitical environment, as we examine individual knowledge construction. Participants articulated the movement through learning spaces as integral in how they constructed knowledge of a topic and the learners also influenced the space. People attended programs alone, but sometimes collaboratively made sense out of material in workplaces. Participants' past regional experiences were unique to their personal knowledge construction and influenced by the environment. For example, Poles felt community around the topic of Katyń, but they each had connections unique to their own learning biographies. Further research is necessary on the reflexivity of the individual to the social as well as agency to the environment within the exploration of knowledge construction.

Concluding Remarks

This study explored learners' perceptions of their knowledge construction process within the context of world affairs outreach education programs. If participants are a self-selected group, how do other individuals engage in learning about world affairs? The content is not limited to groups participating in world affairs education outreach programs. World affairs content does intersect in adults' lifewide and lifelong learning continua, but how? By examining, these questions further, we can begin to probe cascading effects of learners' informal, non-formal, and formal learning within their personal learning biographies. We may also find ways of developing world affairs outreach programs beyond traditional formats. The rich stories of participants give increased energy and understanding for why those in international education outreach do the work that we do and how we might do it better. Learners have many more stories to tell.

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PLANNING PROGRAMS FOR THE ELDERLY: EXAMPLES FROM THE ACTIVE AGING CENTERS

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ABSTRACT: The purpose of the study was to analyze the curriculum of Active Aging Learning Resource Centers (AALRCs). The study applied Howard McClusky's concept and theory of education for older people. The subjects were chosen from one third of 202 AALRCs. The study applied content analysis to analyze selected curriculum. The results of the study revealed that interest courses (56%) followed by the basic courses (31%), service courses (12%) and life courses (1%) are the major types found in the AALRCs curriculum provided in terms of total hours and percentage. The findings of the study show that the courses offered by AALRCs lack balance, fundamental theory, and connection between learners, objectives, and curriculum. Suggestions regarding future curriculum planning, policy and research are provided.

Background

Due to improving technology and medical service, more and more people live longer than before, and the declining birthrate also causes an increase in the senior population. At the end of September, 2010, the population of Taiwanese people aged of 65 or above had reached 2,478,811(DGBAS, 2010), which constitutes about 10.67% of the entire population. Predictably, based on current population figures, by the year 2018, the society will officially enter into the ―Aged Society‖ where the population of seniors will be 14% of the entire population. In the year 2025, the number of seniors will exceed more than 20% of the entire population in Taiwan. This shows that the increasing growth rate of seniors in our country has become a critical topic and issue.

The Taiwanese government is currently paying more attention to the welfare of senior citizens. The government has approved a proposal of ―Ten Years Long Term Care‖ for the senior citizens in Taiwan and has established different senior institutes which offer continuing learning programs and curriculum specifically for seniors. This proposal and plan, however, not only lacks systematic planning and administration, but is also short of professionals and fundamental theories.

According to research from previous years (Ting-Yu Lin, 2000; Yu-Xi Lin, 1997; Hui-Chuan Wei, 2008; Yong-Min Wu, 1998; Ya-Ting Zhuang,), four major problems exist in the curricula: First, these curricula are held by similar types of senior institutes, and the courses are very limited. Second, the curricula seem to be diverse, but the content does not necessarily meet the needs of the seniors. Third, the curricula are mostly not based on

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fundamental theories and empirical evidence, so that the contents might not be educational and meaningful to the seniors. Last, while emphasizing the importance of senior's needs, the curriculum is not explicit with regard to actually increasing seniors' living quality, values, and self-esteem. All in all, Taiwanese senior curricula lack a theoretical point of view.

Howard McClusky, professor of adult education and gerontology, put forth his idea of ―A Margin Theory of Needs" in one of his reports (McClusky, 1971). From an educational standpoint, a senior's needs can be classified into different layers: basic coping needs, expressive needs, contributive needs, influencing needs, and transcendent needs. In order to help the seniors go through these complex layers, a comprehensive and systematic curriculum is required.

Due to the coming ―aged society," the Ministry of Education published ―Toward an Aged Society White Paper" in year 2006. One of the proposals in this paper points out that it is very significant to come out with various educational senior curricula and programs. For example, one goal was to establish ―Active Aging Learning Resource Centers (AALRCs)" in at least each county within approximately three years. An ancillary goal was to dedicate an ―Active Aging Educational Consulting Task Group" to provide working guidelines and training programs for each Center. There are a total of 202 centers now established in Taiwan (a goal that was set for 2010). To create a better living environment for the increasing number of seniors, the Ministry of Education has already made a blueprint for the future development of the aging society by establishing the Centers.

Purpose

After carefully reviewing McClusky's proposal about the purpose of senior's continuing education, we conclude that seniors' needs are greatly influenced by their backgrounds and living environment; therefore, finding out the adequate method to help our seniors live a better life is our goal and purpose. There are two main purposes of the study: to review McClusky's idea of ―A Margin Theory of Needs" and to construct a framework to analyze curriculum for AALRCs.

Literature Review

Throughout the years, a total of 214 dissertations have been written on the topic of senior education and continuing learning. In the past 20 years, most of the research topics have been related to seniors' cognitive development (31.8%), learning (28.0%), and curriculum (12.6%) (Chen, 2007).

According to previous reports (Wei, 2008; MOE, 2010) usually younger seniors and seniors with higher education tend to attend continuing education courses more often. Also demonstrated is that seniors tend to repeat the same courses due to the lack of innovative curricula.

Seniors usually attend entertainment, language, computer, and health type of courses (Lai, 1990; Lin, 2004). One of the studies done by Li-Hui Lin (2007) also offers evidence that senior learners are inclined to choose art, language, or recreation courses more than medical insurance related courses. No matter what kind of research is done, the results come out pretty much the same: the curriculum has not changed too much throughout the years (Wei, 2008).

Review of the educational programs for the seniors (Lai, 1990; Lin, 2004；Wei, 2008) reveals three major inadequacies: lack of research on senior curricula, lack of definite goals and content in the curricula, and lack of fundamental theories and empirical evidence. Since the baby boomers are going to be the largest retirement group, the characteristics of the demographics will be different in terms of their educational background; therefore, the topic of senior curricula becomes a great challenge for many scholars and educators.

Howard McClusky's Theory of Margin

Since 1961, the American government has held a Whitehouse Conference on Aging every ten years, and the most-discussed topic focuses on seniors' continuing education. In the conference of 1971, one of the retired professors from University of Michigan proposed a series of controversial topics related to seniors, and he also laid out a more constructive and systematic system for senior continuing education. His theory of margin, as it is called, explains that what seniors want in their later lives is to be able to maintain energy and power that they used to have. If seniors in their later lives cannot obtain what they want and what they used to have, then it is possible that they may lose their meaning of living. If, however, they can at least maintain a little bit of what they used to have, then they might find a new purpose in their lives.

The word ―margin" in McClusky's theory indicates the gap between seniors' burdens and their power. The idea can be shown in Figure 1:

Senior's living condition:
before learning

Senior's living condition:
after learning
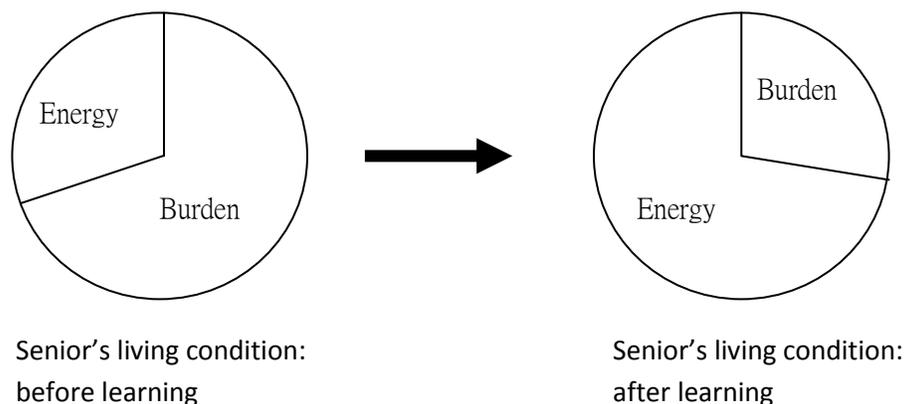
Figure 1. The ratio of senior's burden and power

McClusky's position is that the individual is accommodating, experiencing, and adjusting the ratio change between ―power‖ and ―burden‖ in every growing stage; moreover, this ratio change is especially huge during the senior stage. Therefore, it is very crucial and important for the seniors to learn how to adjust so that their ―power‖ is stronger than their ―burden.‖

McClusky suggests that a person's needs usually come from their insufficiency. In other words, if a senior is illiterate, then he/she will have a desire to learn the basic skills such as reading and writing. Although he/she may not articulate the needs, the courses of coping needs still need to be offered in order to increase the senior's power.

McClusky offers a five-layered need scheme:
1. Coping needs
2. Expressive needs
3. Contributive needs
4. Influencing needs
5. Transcendent needs

The first layer, coping needs, includes daily diet, self-living, self-dressing, health care, and interaction. For example, they need to learn basic education, how to maintain their health condition, how to budget their expenses, and how to make decisions on legal issues.

The second layer, expressive needs, refers to the need of people to participate in certain events. The motivation of participating in certain events comes from people's own interest: for example, muscle training, exercising, and watching movies, etc.

The third layer, contributive needs, supposes that the seniors also want to contribute something to the society. They want to be helpful to their communities and the society regardless of their ages. For example, many seniors are willing to volunteer in hospitals, schools, or other public places.

The fourth layer, influencing needs, shows that seniors also want to influence their surroundings with their efforts. Although seniors' abilities decline, they still obtain adequate knowledge to influence certain parts of the society. For example, some of the seniors have desires to run for presidents of clubs or organizations.

The fifth layer, transcendent needs, is about getting to know the deeper meaning of human life. If seniors can engage in retrospection about their lives and realize the deeper meaning of their later lives, then they will perceive the value and importance of continuing their learning and enjoy their lives.

McClusky's five-layered theory has become the foundation of the senior curricula in Taiwan's AALRC' project. Although McClusky's theory was proposed in the year 1971 during the Whitehouse Conference on Aging, his idea has been widely used since the Conference. Taiwanese senior education related studies do not have a thorough

understanding of and research on his theory. Previous studies have paid more attention to the repetitive and less significant issues such as the similarity of courses, few senior participants, and less variety among the curricula.

Methodology

Research Framework

Our study was mainly based on McClusky's theory and referred to different AALRCs. This study started with constructing a framework for analyzing the courses of AALRCs based on McClusky's theory.

Research Questions

This study utilized the framework shown above, and used the teaching materials provided by each AALRC. There are four research questions:

1. Based on McClusky's theory and the framework described above, what is the distribution of courses provided by AALRCs?
2. How are courses distributed among AALRCs in terms of McClusky's five-layered theory?
3. What are the common problems of program planning among AALRCs?
4. According to the results of the study, what are the suggestions for future course planning for AALRCs?

Materials

The Ministry of Education (MOE) has been establishing local senior learning centers in different counties and cities of Taiwan. There were at least 202 different senior learning centers all over the country by the end of May, 2010. In order to evaluate the condition and effectiveness of each center, scholars picked the top 85 centers based on results of the MOE's yearly evaluating report for detailed inspection. Out of 85 centers, 27 centers did not provide thorough details such as course titles, and course hours, etc. The distributions of the resulting 58 senior learning centers are shown in Table 1.

Method

This study can be classified as ―exploratory research.‖ In this study, we tried to find out and understand the challenges regarding the courses offered in each center by analyzing their courses. The method of content analysis was applied to analyze the curricula offered by each center. The unit of analysis was categorized into three major types: types of courses, subjects' titles, and hours. The calculation unit of our data is the percentage of the course hours.
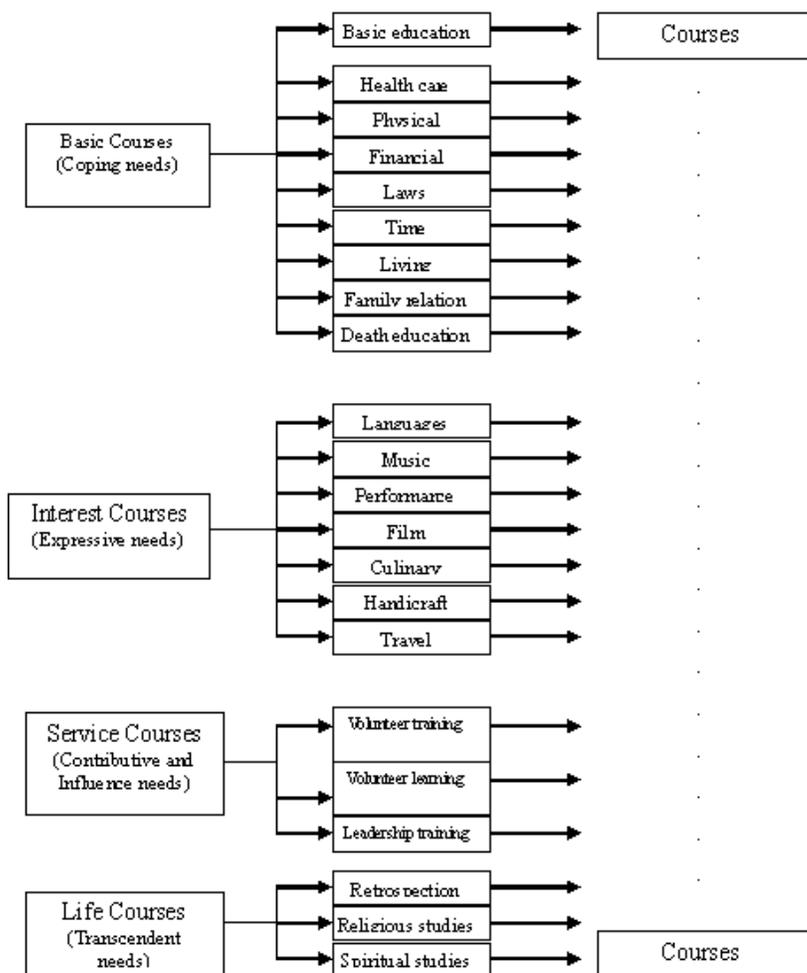
Figure 2. Frameworks of the study

Table 1

Distribution of Active Aging Learning Resource Centers (AALRC)

Cities Counties	Numbers of AALRCs	Cities Counties	Numbers of AALRCs	Cities Counties	Numbers of AALRCs
Keelung city	2	Taichung city	1	Kaohsiung city	2
Taipei city	3	Nantou county	2	Pingtung	3
Taipei county	4	Changhua	4	Ilan county	2
Taoyuan county	4	Yunlin	2	Hualien city	2
Hsinchu county	2	Chiayi	3	Taitung	4
Hsinchu city	1	Tainan city	1	Penghu	2
Miaoli county	2	Tainan county	3	Jinmun	1
Taichung county	4	Kaohsiung county	4		

N＝58

Results

Courses Provided by AALRCs

The distribution of courses provided by the learning centers is shown in Table 2.

Table 2

Course Distribution of Each AALRC Center

Course category	District (Numbers)	Hours	Total hrs. of the course (%)
Basic courses	North District (16)	2,220	5,505 (31%)
	Center District (15)	1,587	
	South District (16)	1,101	
	East District (08)	320	
	Outlying District (03)	277	
Interest courses	North District (16)	3,694	10,078 (56%)
	Center District (15)	3,287	
	South District (16)	2,291	
	East District (08)	351	
	Outlying District (03)	455	
Service courses	North District (16)	512	2,201 (12%)
	Center District (15)	1,167	
	South District (16)	411	
	East District (08)	81	
	Outlying District (03)	30	
Life courses	North District (16)	44	193 (1%)
	Center District (15)	101	
	South District (16)	45	
	East District (08)	3	
	Outlying District (03)	0	
Total		17,977	

The Learning Centers that were analyzed focused on ―interest courses" more than other types of courses: 56% for interest courses, 31% for basic courses, 12% for service courses, and 1% for life courses.

The distribution of basic courses offered in different districts of Taiwan is shown in Table 3.

Table 3

Distribution Rate of Basic Courses

District (Numbers)	Hrs. of the basic course	Total hrs.	Order of proportion
East District (08)	320	755	42%(1)
Outlying District (03)	277	762	36%(2)
North District (16)	2,220	6,470	34%(3)
Center District (15)	1,587	6,142	26%(4)
South District (16)	1,101	3,848,	29%(5)

The distribution of interest courses offered in different districts of Taiwan is shown in Table 4.

Table 4

Distribution Rate of Interest Courses

District (Numbers)	Hrs. of the basic course	Total hrs.	Order of proportion
Outlying District (03)	455	762	60%(1)
South District (16)	2,291	3,848	60%(1)
North District (16)	3,694	6,470	57%(3)
Center District (15)	3,287	6,142	53%(4)
East District (08)	351	755	46%(5)

The distribution of service courses offered in different districts of Taiwan is shown in Table 5.

Table 5

Distribution Rate of Service Courses

District (Numbers)	Hrs. of the basic course	Total hrs.	Order of proportion
Center District (15)	1,167	6,142	19%(1)
East District (08)	81	755	11%(2)
South District (16)	411	3,848	10%(3)
North District (16)	512	6,470	8%(4)
Outlying District (03)	30	762	4%(5)

There are hardly any self-transcendent and life courses offer in Taiwan senior learning centers. These courses take up only 1.6% in east district, 1.1% south district, 0.6% in north district, 0.3% in east district, and 0% in outlying islands, respectively.

Distributions of the Courses by Layers of Need

Types of the basic courses based on McClusky's theory include basic education, health care, physical education, financial management, law education, time management, living arrangement, family relation and death education. Names of the courses reported by each center can be categorized as adult literacy, Chinese class, computer class etc. as shown in Figure 3. Types of the interest courses include languages, music, performance, film, culinary, handy craft and travel. Names of the courses are like the English, Japanese language, Erhu fiddle, bamboo flute, drums, etc. as in the figure 4 below. The service courses that fulfilled the seniors' contributing and influencing needs include volunteer training, learning and leadership training programs. Names of the courses reported are volunteers' experience exchange, communal event's guide training, and Leadership course as in Figure 5. The last type of course is life course which reflects the self-transcendent needs identified by McClusky. Names of such courses include life stories, intergenerational activities and life values (Figure 6).
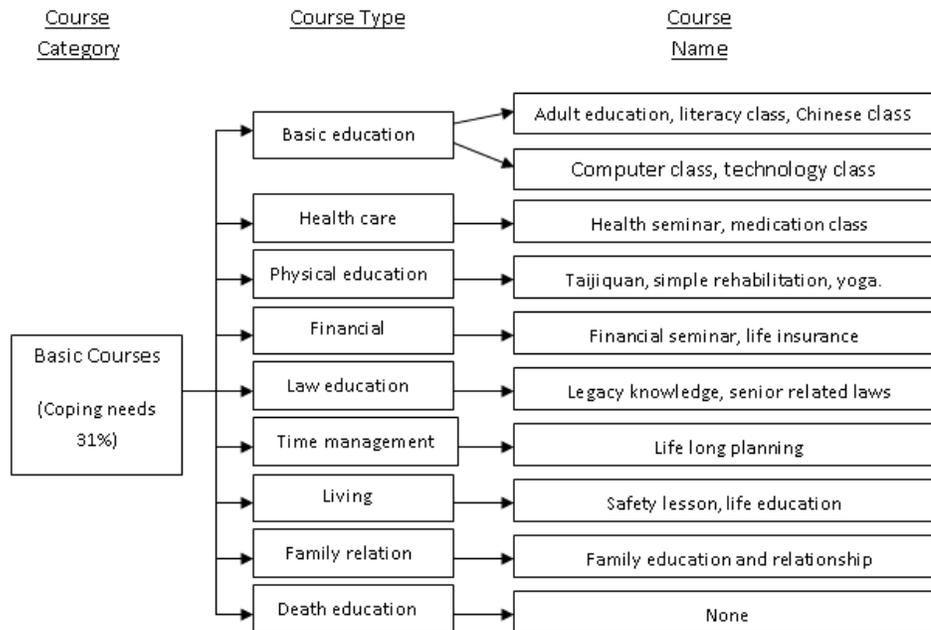
Figure 3. The Structure of Basic Courses (Coping Needs)

Course Category	Course Type	Course Name
	Languages	English, Japanese
	Music	Erhu fiddle, bamboo flute, drums
	Performance	Skit performance, storytelling
Interest Courses (Expressive needs 56%)	Film	Senior related films, film festival
	Culinary	Snack making, baking lesson,
	Handicraft	Drawing, ceramics, weaving, gardening
	Travel	Travel learning, eco tour
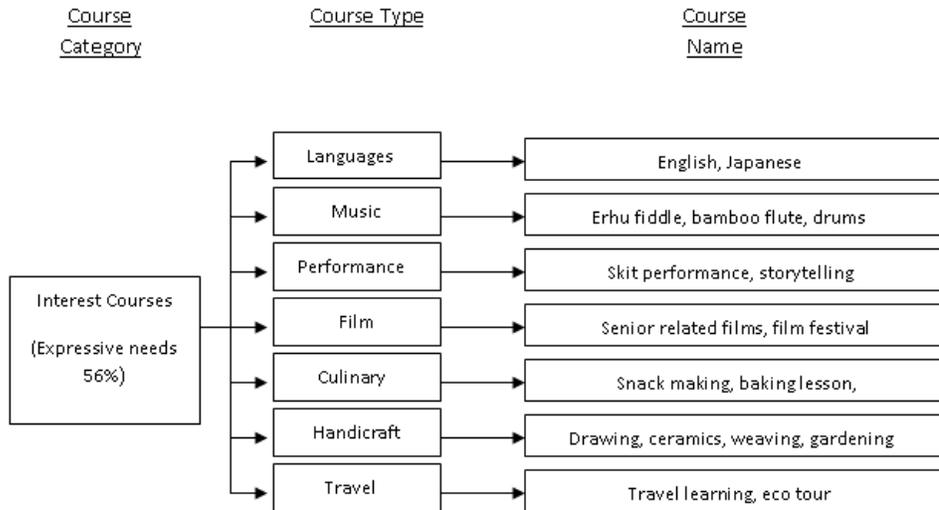
Figure 4. The Structure of Interest Courses (Expressive Needs)

Course Category	Course Type	Course Name
	Volunteer training	Volunteers' experience exchange
Service courses (Contributive and Influence needs 12%)	Volunteer learning	Communal event's guide training
	Leadership training	Leadership course
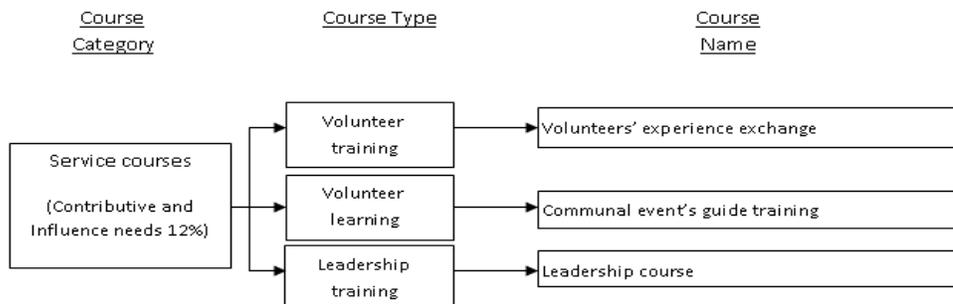
Figure 5. The Structure of Service Courses (Contributing and Influencing Needs)

Course Category	Course Type	Course Name
	Life retrospection	Life stories, intergenerational activities
Life courses (Self-Transcendent needs 1%)	Religious studies	Beliefs, life values
	Spiritual studies	None
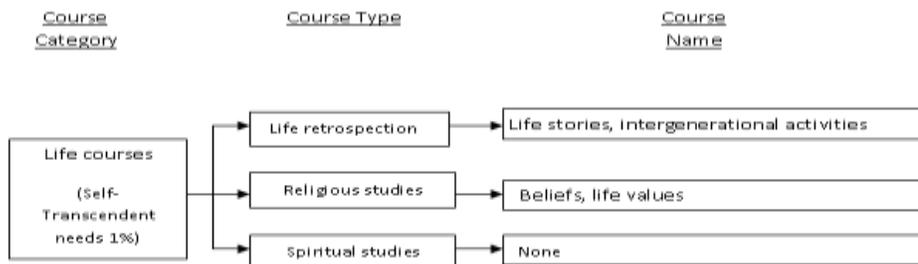
Figure 6. The Structure of Life courses (Self-Transcendent needs)

Conclusion

Results of the study yielded the following observations:

1.   Taiwanese senior learning courses still need more development and could be better based on the theory.

2.   Taiwanese senior learning centers offer various interest courses; however, these kinds of courses have been going on for years, and need to be innovated and re-created.

3.   Examining Taiwanese senior learning courses based on McClusky's concept and point of view, our country's senior learning courses are still insufficient, and these courses will not achieve the goal of making senior's life better. There are plenty of interest courses offered in different centers; however, these courses do not help seniors learn how to ―survive and live better."

4.   The number of interest courses has gone beyond other types of courses; as a result, this phenomenon weakens the primary purpose of the senior learning center. The Taiwanese social welfare department has already spent 26 years to develop a series of interest courses through different communal events for the seniors; therefore, the senior learning centers should focus on how to teach the seniors to live better in their later lives. The budget of each center is sponsored by Ministry of Education; therefore, all of the courses are tuition-free, so it will be a waste if the seniors do not benefit the most from these courses.

5.   The senior curriculum planners do not have a good understanding of the concept of seniors' needs; therefore, the seniors can hardly benefit from those courses. Even though the curriculum planners all look up to McClusky's theory and concept, the curricula do not reflect much on his original purpose.

6.   There is a great imbalance among four different types of courses; for example, the senior learning centers provide more interest courses than any other courses. Moreover, we do not see a clear structure and mission for each type of course. There are many important topics that the curriculum planners did not include into the curriculum, so that seniors might not be able to learn what is really necessary for them.

Suggestions

1.   Enhance practitioners to develop basic courses and adjust the learning hours according to the types of courses and learner characteristics. Make sure to clarify that the purpose of the senior learning course is not merely ―fun and entertaining," but ―useful and meaningful" to seniors' later lives.

2.   Encourage those seniors who have already received certain levels of education to participate in service courses and life courses. Instilling the thought and idea of ―contributing to the society" will increase the senior's ―power" and worth of living.

3.   Have a clear view and goal regarding education for the elderly in the senior learning courses.

4.   Regulate the content of the courses by providing course outlines and useful materials.

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Key words： AALRCs' curriculum, the elderly education curriculum, the elderly education objectives

REFLEXIVE DESIGN FOR INTERNATIONAL/CROSS-CULTURAL ADULT AND HIGHER EDUCATION: THE CASE OF SHORT-TERM STUDY ABROAD

Joellen E. Coryell [1]

ABSTRACT: This paper provides the results of a research study that investigated the design and learning reflections of a short-term study abroad program based on facilitative adult learning theory and practice. Findings into the unique nature of the interrelationships inherent in this community of practice offer insight for developing effective learning activities and program design.

Introduction

Today's adults are required to develop a cognitive and affective responsiveness and flexibility in order to interact sensitively in situations involving international cultural contexts, practices, beliefs, understandings, and communications. One way to support this learning outcome in adult and higher education is to offer opportunities to study abroad. These experiences can provide students an authentic setting in which to learn about global diversity and the interdependence and interrelationships of local, national, and international issues across the world's population today. The Institute of International Education (2009) reported that in the past ten years, study abroad participation in US higher education increased over 150%. Although the report did not specify ages, junior and senior status students represented 57.2%, while graduate students represented an additional 10.5%. These figures indicate that adults of all ages are enrolling in these programs in increasing numbers.

Over the past few years, short-term programs have comprised over 50% of study abroad programs nationally (Institute for International Education, 2009). Chieffo and Griffiths (2009) suggest these programs tend to be more attractive to nontraditional and working adults who are unable to afford the time and money investments inherent in longer programs. However, they also point out short-term study abroad is sometimes viewed skeptically with the belief that the focus is more on travel and adventure than on academic rigor. Indeed, good intentions in offering study abroad experiences do not always produce the kind of learning, development, and transformation that are intended (Gray, Murdock, & Stebbins, 2002; Green, 2002). Recent research suggests study abroad instruction has essentially remained static and calls for a significant revision to curricula and instructional practices to meet new global-diversity learning needs (Vande Berg, 2007). Unfortunately, there is very little current evidence about how best to facilitate adult learning in these programs. Investigators claim that studying abroad transforms learners' global perspectives and cross-cultural effectiveness (Dwyer, 2004) and can

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increase student self-reliance and self-confidence (Corda, 2007). However, what specific learning activities/experiences actually facilitate these transformative outcomes, and how they are best designed and facilitated, have not been well-documented. The discipline of adult learning and teaching becomes an invaluable resource toward this end. Our research literature focuses on facilitating meaningful learning that promotes learner and instructor reflection/praxis, experiential and collaborative learning, and transformative educational outcomes. As an adult educator and researcher, I was interested in studying an approach to curriculum and instruction in short-term study abroad that was based on researched adult learning theory and facilitation. Accordingly, I consulted with two instructors to help redesign the methods and activities in their interdisciplinary, short-term study abroad program. I then conducted an investigation to evaluate the new design and learning activities, and their impact on academic content and adult cross-cultural learning. The following research questions guided my study: (a) In what ways can adult learning and teaching principles (experiential learning, reflexive learning and teaching praxis, effective mini-lectures, collaborative learning and dialogue) be incorporated into short-term study abroad? (b) What types of learning experiences might be meaningful and transformative to adult learners who participate in this kind of program? The focus of this paper is, therefore, on the assessment of the course design and activities based on participant reflection and feedback.

Theoretical Framework and Literature Review

Short-term study abroad programs typically last for one to five weeks and often consist of a faculty-led group of students from one institution. This unique course context led me to frame the research through the lens of situated cognition (Lave & Wenger, 1991). Situated cognition posits that the contextual characteristics (resources, physical setting, sociocultural and political influences) of a learning setting, as well as the instructors, other experts, and learning participants in the educational *community of practice*, all shape the learning and participation that occurs. Study abroad offers a unique situated context to investigate these complex influences on international/cross-cultural learning, as well as the nature of communities of educational practice in these programs.
 Chieffo and Griffiths (2004) conducted an extensive study that investigated the impacts of short-term programs. They found that when compared to learners who studied at home, 30 days after returning, study abroad learners ―were generally more disposed to communicating in a foreign language and considered themselves more patient with people who do not speak English well" (p. 171). They also found that these students acquired increased course-related subject matter knowledge, deepened appreciation for the foreign culture, and the ability to make comparisons between home and the host country. Study abroad students also identified enhanced patience, understanding, and tolerance. Engle and Engle (2003) suggested that the instructional design, learning outcome objectives, and specific characteristics of a program are more important for academic and student development than the length of stay. Spencer, Murray, and Tuma, (2005) contend that focused and reflexive interaction with the host country and culture, with time to process the experience, are essential.

Orndorff (1998) found that adult learners who participated in short-term travel experiences perceived transformative changes in self-perception and intercultural understanding through their immersive experiences. Likewise, Jung and Caffarella (2010) found that adult learning in graduate study abroad produced significant cultural experiences and development. Dirkx, Spohr, Tepper, and Tons (2010), however, recently found that short-term study abroad may not always result in personal transformative learning outcomes for adults as might be expected. The dichotomy of these recent findings and the paucity of previous research on the types of learning activities, intercultural development, and personal transformation that actually occurs in study abroad experiences (Bakalis & Joiner, 2004; Dwyer, 2004; Dwyer & Peters, 2004; Paul & Mukhopadhyay, 2003) suggest further investigation is warranted into how educators can facilitate meaningful adult cross-cultural learning in these programs (Corda, 2007).

The Study

Program Development and Content

The objective for the study abroad course entitled, *Italian Urban Culture*, was for learners to acquire certain tools for learning about a foreign cultural community. Through the interdisciplinary study of Italian urban history and architecture, the learning objectives were to be able to read Italian urban space through the lenses of urban historical theory (an analysis of cities via geographical hierarchy, their historical relationship to each other, and the internal physical order), and through urban physical form and its symbology/mythology: *piazze* (public squares), places of worship, official buildings, ancient urban sites, and works of art. The course took place over three weeks in Italy while living in Rome, Venice, and in Tuscany primarily at study centers. Additional learning excursions to an organic farm and to Roman catacombs were also included. Activities required learners to identify different urban and architectural types, styles, and materials that were introduced in the course, to become familiar with Christian and mythological symbols, themes, and stories, and to recognize the different ways that ancient buildings, architectural types, and spoils have been re-inhabited and remade over time to create a rich physical palimpsest of history and culture. Students, both graduate and undergraduate, enrolled from across five colleges within the institution. My role was as instructional design consultant, and then researcher.

Pre-departure Preparation

Pre-departure meetings were designed to introduce the students to (a) each other and the instructors; (b) the course objectives; (c) the theories, concepts, and vocabulary to be introduced in the course; (d) an overview of language and cultural practices participants were likely to encounter; and (e) program logistical information. Before the departure abroad, students participated in two activities developed to prepare them for learning outside of a classroom, in a foreign culture. In an initial self-reflection activity, students were asked to think about and describe their own personal cultural definitions and their preliminary understandings of Italian urban culture. These activities provided a knowledge baseline for the learners and instructors alike. The instructors designed a

second preparation activity to introduce the participants to the learning design. Using the overarching concepts of the course, they guided the students on a learning excursion in their own urban setting. This included a visit to two town squares, an urban café for a quick lunch, and a visit to the Greek and Roman sculpture gallery at a museum. The group used public transportation, walked extensively, and learned about the differences and challenges of learning in field-based experiences/learning excursions. The students were also asked to bring a small notebook for note taking along the way. These activities approximated those in which they would engage abroad.

Learning Excursions and Mini-lectures, Daily Journal Prompts, Morning Openers, and Evening Debriefs

Learning excursions were planned for most days with afternoons off, two additional free days, and a free weekend. Each morning of a learning excursion, the professors would provide an overview of the day. They described the prompts for which the students were to consider and investigate while on location. Students were heterogeneously assembled into learning groups by gender, age, academic major, and previous international experience. This provided opportunities for collaborative learning as well as to promote safety in large urban areas. During the excursion, mini-lectures were scheduled at certain junctures in order to focus the learners' attention to the specific details of the course content and cultural concepts being studied that day. The instructors prepared the mini-lectures as a team in order for two voices of expertise to analyze and enhance the content via interdisciplinary intersections. A debriefing session was scheduled each day to provide an opportunity for students to dialogue about their own understandings and experiences. Learners then used the notes they took throughout the excursions to respond to daily journal prompts. These journals included reflections on their learning during the excursions and free time.

Reflexive - Reciprocal Feedback, Assignments, and Grading

Midway through the program, students scheduled individual meetings with the professors to discuss their progress in the course. These meetings focused primarily on their journal entries to ensure students were keeping up with the daily prompts and were approaching their journal reflections via the course concepts. In addition, a modified version of an interactive group reflection activity (Millis, N.D.) was designed to gather course instructional activity feedback and learning reflections from the students. I conducted these group reflections at the midterm and at the end of the course. No student names or identifying information were recorded for these activities. The group reflection exercises asked the learners to provide specific input on the course and on the learning activities. I then shared the feedback (both positive and negative) with the instructors for their own reflection/praxis. They then made adjustments to the design and instruction, when possible, based on the focus group responses.

Student learning assessment consisted of four equally-weighted components: the completed learning journal, participation/program engagement, creation of a personal coat of arms (Italian family *impresse* were studied throughout the course), and a final

exam essay. The instructors designed each of the graded elements to bridge the individual experience with the course content in personally meaningful ways.

Participants, Data Gathering, and Analysis

The research took place over two years with two iterations of the course abroad. Twenty-four learners (22 undergraduate and 2 graduate students) agreed to participate in the study. There were six male students and 18 female students. Participant ages were between 19 and 46 years of age; half were between 23 and 46. Students hailed from five different colleges. Twelve of the learners self-identify as Hispanic, two as Vietnamese-American, one as Pakistani-American, and the remainder identify as Caucasian. Nine had never been out of the US, seven others had travelled into Mexico, and the rest had been to countries outside the US and Mexico. None had travelled to Italy nor studied the Italian language.

Multiple data sources were used for the triangulation of evidence. This included the final group reflections (across five groups) on the instructional activities and an open-ended individual reflection survey on specific meaningful experiences/activities and learning take-aways (academic, social, what they learned about themselves, and any life lessons learned). Data were analyzed using constant-comparison (Glaser & Straus, 1967) to identify specific codes, categories, and eventually themes across the data set.

Findings

Participant reflections on meaningful course activities and experiences provided insight about learning that is situated within a community of short-term study abroad practice. Data analysis identified four major themes of learning interactions to be the most consequential for these learners. These themes include interactions of the learner with other learners and professors, with the foreign culture/individuals, with the academic content, and with oneself. Meaningful and transformative learning occurred through intimate and intense living arrangements, formal student grouping activities, formal and informal interactions with professors, and personal free time experiences. Each is described briefly below.

Learner with Other Learners and Professors

Each group identified both instructional and informal interactions with other students as particularly meaningful. Ten learners also indicated in their personal reflections the significance of learning with and from other students from different backgrounds and academic disciplines. Living and learning in close contact with each other for three weeks also helped them to broaden their perspectives through group discussions and to develop interpersonal skills including ―negotiation,‖ ―compromise,‖ ―understanding,‖ and empathetic consideration for others. One participant disclosed, ―I didn‗t really think I'd make close bonds. To my surprise, I did, and because of that my experience was even more rich and vibrant.‖ Another suggested, ―I was surprised how much I learned …

because of the dynamics of living in a different culture and interacting with different personalities of our group."

The group reflection data also indicated that relationships between student and professors provided rich opportunities for learning. The individual (journal) and group reflection activities at the midterm provided the instructors important information about needed shifts in the design. The students were grateful for the instructors' willingness to involve learner input into the design, and the changes they made (i.e., explaining the journal prompts in more detail each morning and choosing to have lunch with different groups in order to offer additional discussion/help). Over half of the participants suggested that ―one-on-one time with the professors" who were ―passionate for the content and culture," and ―were relatable" made the experiences in the course even more meaningful. Spending extensive time together during the three weeks provided opportunities for students and professors to really get to know one another. One summarized the overall feeling: ―I really appreciate knowing they [the instructors] cared about our lives…[and wanting to know] how this experience has influenced us and our plans."

Learner with Native Culture/Individuals

This theme captured 13 occurrences across the group reflection activities and consisted of cross-cultural interactions with the native culture and peoples. Specific cultural activities were important in their developing understanding of content and international/cross-cultural diversity. They included learning about language basics and cultural practices in the pre-departure meetings and in discussions abroad, physically experiencing culturally important/iconic sites and museums, and staying in an apartment rather than in a hotel (―the feel of living in the city"). Participants indicated that having a variety of learning experiences in many different places provided opportunities to learn about the culture from different perspectives (historical sites, religious centers, museums, shops, restaurants and cafés, the organic winery and olive oil producer), and to be able to do so from different regional viewpoints. Fourteen of the participants revealed that interpersonal experiences with Italians in these situations developed their appreciation of the need for socioculturally-sensitive communication practices and foreign language skills. One commented, ―talking with people that actually live the culture and not just people who study it really gives you a good idea of what their lives are really like." Another offered,

> On several occasions, I was either physically lost or trying to talk with an Italian about any number of subjects, and during those times I found myself becoming more immersed within the modes of Italian lifestyle and culture. [These were meaningful experiences] because they gave me a realistic, relatable, and modern experience, which provided me with true development in my understanding and use of Italian culture and language…these interpersonal, intercultural crossings have expanded my world-knowledge and understanding.

A third participant explained, ―It boils down to the interaction element: immersion leaves no room for insecurity, and you have to at least try communicating with others. The

appreciation for the culture that's gained in doing so makes the whole experience extremely meaningful." Finally, one learner provided this metaphor, ―without going abroad, you simply cannot get a perspective on global culture. It's like chocolate: I can tell you about how great it is, why I love it, and what you'll like about it…but unless you taste it, you'll never really understand."

Learner with Academic Content

This theme illustrates the combined effect of an interdisciplinary approach to the study of urban culture, reflexive individual and group activities, field-based experiences, mini-lectures, and discussions. All five final group reflections indicated its importance. Participants specifically expressed that physically experiencing each new city and different cultural places, in conjunction with studying the academic content gained in activities before, during, and after the experience, ―[brought] the city to life by the introduction of new perspectives." One participant suggested that the design of the learning excursions and daily learning journal assignments ―gave me new insight into ideas that I already thought I had an understanding of…they enriched my understanding of the Italian people and culture in ways that I didn't think were possible [and] brought critical reflection to the next level." The new content knowledge gained through these integrated activities provided learners with tools for studying new urban cultures. A student offered, ―I will use central place theory and the urban culture model to be able to expunge/deduce information from sites/paintings/etc. in my professional life." Another concluded, ―there are reasons, cultural and political, that a certain building is created in a certain fashion. It behooves us all to take an interest in the answers to questions about the *why*."

Learner with self

The personal choices of activities during free time, meaningful incidental learning experiences, independent, self-directed learning choices, and (re)connections with personal faith systems comprise the *learner with self* theme. Seven occurrences of this theme were identified across the five group reflection activities. Fourteen participants also affirmed personal growth in their individual reflections. They characterized this growth as new-found ―independence," ―more courage," ―self-confidence," ―better decision making," ―being able to stick up for myself," and ―enhanced curiosity about different cultures." Most suggested they were committed to continued cross-cultural learning. One offered she was now better at ―conquering my fears – doesn't matter what is foreign, I want to know about it now."

In addition, half of the participants indicated that learning excursions to spiritual/religious centers in urban settings cultivated reconnections with their personal faith systems. One participant stated,

> I feel I have become closer with my religion being on this trip. Even though I go to church every Sunday, I realized how distant I've become with God. This trip has not only made me aware of this, but it also showed me how much more I need

to learn. I've learned more in these three weeks than I did in many years of Sunday school and two years of Catholic school.

Even non-Catholic participants indicated that the learning activities in the course were significant to their intrapersonal learning experiences,

I did something I wouldn't normally do, which is praying. Since I'm not a Catholic, I didn't pray to the Saints for ceremony purpose. Instead I asked them for help to answer my questions that I struggled to answer over many years. I asked St. Margherita [Patron Saint of Cortona] to show me how she was able to find the strength [so that I may] face my fears and insecurities.

Challenges and Discussion

The learners and instructors certainly faced challenges. The interdisciplinary nature of the course sometimes left these students (whose majors were neither history nor architecture) underprepared to glean what was intended from the assigned readings. Learners also indicated that too much information (input overload) occurred at times, and that ―learning and walking and taking notes is hard!‖ Challenges with street traffic noise during mini-lectures, individuals getting temporarily lost or wanting to take pictures when the group needed to proceed, student illness, unexpected transportation problems, and physical exhaustion all took a toll on instruction interactions, on students, and on professors.

The findings offer implications about how reflexive short-term study abroad programs can make the most of the intercultural, interpersonal, and intrapersonal development opportunities that living and learning in a new culture entails. As such, this study provides new insight into both instructional design and the nature of short-term study abroad communities of practice. Facilitators of adult learning in these programs must re-imagine the learning experience from what they may teach at home. Facilitating meaningful adult learning in this program required knowledge of effective adult learning theory and practice, sustained instructional praxis, and flexible implementation. Learner interactions with the sights, sounds, smells, physical sensations, academic content, cultural practices, foreign languages, classmates, professors, foreign peoples, and themselves comprise a holistic consciousness of the unique learning situation in these programs. Analysis also showed that the interrelationships among learners, professors, the foreign culture and individuals, the academic content, and within the individual learners themselves, should anchor effective program design. As well, interdisciplinary approaches to cross-cultural learning can foster meaningful perspective transformations when complemented with a variety of activities for learners to interact and learn within the relationships mentioned above. As this study is limited by the context of one program, however, further research is warranted to expand current knowledge and understanding of these rich, yet complex learning opportunities and situations in adult and higher study abroad educational programs.

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DEVELOPMENT OF THE MOTIVATION FOR INTERNATIONALIZING CURRICULUM SCALE (MICS)

Emmanuel Jean Francois, Ph.D.[1]

ABSTRACT: Faculty members are instrumental in internationalizing the curriculum in a higher education institution. Their favorable or unfavorable orientation toward global education initiatives might significantly affect their engagement to internationalizing the curriculum. The Motivation for Internationalizing Curriculum Scale (MICS) aims to assess college professors' motivation toward internationalizing the curriculum. Internationalizing in higher education implies the integration of international, intercultural or global dimensions in curriculum, instruction, research, and service functions in postsecondary institutions. The MICS was administered to a national random sample of 418 college professors. The findings revealed the dominant intrinsic and extrinsic motivational factors that may influence faculty motivation for internationalizing the curriculum.

Introduction

Research shows there is a growing interest in U.S. institutions of higher education to implement global education initiatives (Siaya & Hayward, 2003). This interest comes not only from a desire to produce globally competent graduates (Ninnes & Hellsten, 2005), but also from the opportunity for more international student enrollment (Siaya & Hayward, 2003). However, Fisher (2008) noticed in a study using a sample of 1,070 U.S. colleges and universities that internationalization has not been recognized as a priority among most U.S. institutions of higher education. The study revealed that despite significant increases in support for faculty to study and research abroad, less than 10% of U.S. colleges and universities take into account international work or experience in their tenure process (Fisher, 2008). In fact, Siaya and Hayward (2003) had already found in a study that the lack of consideration for international work and experience in tenure process has impacted the willingness of faculty members to participate in internationalization efforts even when the institutions offer other types of campus incentives. Internationalization in higher education requires not only the commitment of senior leadership to define institutional vision and strategic plans, but also faculty acceptance and engagement for the implementation of global learning goals in curriculum, teaching, research, and service functions of institutions of higher education (Olson, Green, & Hill, 2006). What are the intrinsic and extrinsic motivational factors of U.S. College professors related to internationalizing the curriculum in higher education? This study aimed to develop the ―Motivation for Internationalizing Curriculum Scale (MICS),‖which will enable assessment of such intrinsic and extrinsic motivational factors.

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Background

The development of the Motivation for Internationalizing Curriculum Scale (MICS) was inspired from the Herzberg's two-factor theory (Herzberg, Mausner, & Snyderman, 1959). Herzberg's theory provided a framework to analyze both intrinsic and extrinsic motivational factors related to global education initiatives as well as a combination of intrinsic and extrinsic factors of motivation (Castillo & Cano, 2004). Many scholars agree that motivation can be intrinsic or extrinsic. Intrinsic motivation refers to an individual desire to participate in an activity just for a sense of self-fulfillment (Deci & Ryan, 1985). On the other hand, extrinsic motivation suggests a behavior that is motivated by external rewards or expectations (Deci & Ryan, 1985). Marlon (1999) conducted a study to evaluate the effects of faculty motivation on their engagement or resistance toward distributive education at an institution of higher education. The study revealed that the majority of faculty members were motivated by personal fulfillment and opportunity to help students learn. In a study to investigate what motivated faculty to teach distance education courses, Wolcott & Betts (1999) found that the top expected rewards were (a) personal motivation, (b) ability to reach new types of learners, (c) overall job satisfaction, (d) intellectual challenge, and (e) opportunity to develop new ideas. Rockwell, Schauer, Fritz, and Marx (1999) noticed that intrinsic factors like self-gratification and opportunities to provide innovative instruction were the primary incentives for faculty involvement in higher education. Parker (2003) found that faculty members are motivated to teach traditional courses by intrinsic rewards such as self-satisfaction and flexible scheduling.

Several studies revealed that incentives and rewards contribute to motivate faculty work in higher education (Serow, Brawner, & Demery, 1999; Tang & Chamberlain, 2003). Fox (1985) contends that the institutional reward structure for promotion contributes to motivate faculty members toward research productivity. Consequently, some scholars argue that faculty research productivity peaks during the tenure period (Hu & Gill, 2000). Other studies assert that tenure status, length of the tenure probationary period, course load, financial support for research, and working time allocated to research activities are among the main motivational factors that influence college professor's research productivity (Buchheit, Collins & Collins, 2001). In a study on a sample selected from business faculty members of ten mid-western universities, Chen, Gupta, and Hoshower (2004) found that tenure, promotion, and salary raises were the most valued rewards that motivated participants to conduct research.

Schifter (2000) compared the top five motivating and inhibiting factors related to faculty participation in distance education programs, at George Washington University. The top five motivating factors that emerged from the findings were (a) personal motivation to use technology, (b) opportunity to develop new ideas, (c) opportunity to improve teaching, (d) opportunity to diversify program offerings, and (e) greater flexibility for students. The five inhibiting factors were (a) lack of release time, (b) concern about faculty workload, (c) concern about quality of course, (d) lack of distance learning training provided by institution, and (e) lack of grant for materials/expenses. One observation one can infer from these findings is that the motivating factors were intrinsic

whereas the inhibiting factors were extrinsic. This stresses the fact that both intrinsic and extrinsic variables must be taken into consideration when analyzing factors that influence an individual motivation to behave a certain way.

Debates have been ongoing about the effects of extrinsic rewards on intrinsic motivation (Harackiewicz & Sansone, 2000). According to Deci and Ryan (1985), intrinsic motivation can contribute to flexibility, creativity, and spontaneity, whereas extrinsic motivation can result in anxiety and low self-esteem. Deci, Koestner, and Ryan (1999) conducted a meta-analysis of research on intrinsic and extrinsic motivation, and found that extrinsic motivation attached to an intrinsically motivated behavior can undermine the intrinsic motivation. However, the negative effect of extrinsic reward on intrinsic motivation was observed in the context of a control-oriented extrinsic behavior. Deci, Koestner, and Ryan (1999) noticed that extrinsic rewards that align with the human need for autonomy, competence, and relatedness (Franken, 2002) have positively affected intrinsic motivation. Therefore, motivation cannot be simply addressed in the light of its intrinsic and extrinsic dimensions, but in a multidimensional manner. Blackburn and Lawrence (1995) indicated that the effect of incentives and rewards as motivational factors depends on individual characteristics (demographic, cognitive attitudes, non-cognitive attitudes, and values) and environmental factors (institutional norms, faculty composition, availability of resources, fiscal solvency of the institution, and structure related to faculty governance).

Backman (1981) indicated that one of the barriers that contribute to faculty resistance to internationalizing the curriculum is the fact that the reward system at some higher education institutions does not stress the usefulness and advantage of international experience in achieving internationalization in U.S. colleges and universities. Siaya and Hayward (2003) found more recently that international scholarship is included in tenure and promotion policies of only 4% of U.S. colleges and universities. Consequently, faculty members have less incentive to incorporate global content in curriculum and teaching as well as collaborate in international service projects. Tenure and promotion are found to be among faculty motivational factors. Restrictive tenure and promotion policies may affect not only extrinsic motivation of U.S. college professors but also their attitude toward global education initiatives. In fact, the National Association of State Universities and Land Grand College (NASULGC, 2004) found that some faculty perceive international engagement as jeopardizing to their careers, because international components are not included in tenure and promotion criteria of most U.S. colleges and universities. On the other hand, Siaya and Hayward (2003) found that some instructional faculty members have interests in global education that do not depend on institutional practices and policies. In other words, both intrinsic and extrinsic motivational factors may be associated with U.S. college professor drive for internationalizing the curriculum.

Development of the Scale

The Motivation for Internationalizing Curriculum Scale (MICS) is a 20-item questionnaire to assess U.S. college professor motivational factors toward internationalizing the curriculum. Items related to intrinsic and extrinsic motivation were

selected based on their use in previous studies regarding motivation of faculty in higher education institutions (Navarro, 2004; Parker, 2003; Schifter, 2000). The items were selected because of their brevity and relevance for research concerning instructional faculty members in higher education institutions. The approach of adapting items from previous research to assess motivation or behavior has been used in various studies (Schifter, 2000).

To address U.S. college professors' intrinsic motivational factors, five items were adapted from Navarro's (2004) questionnaire regarding factors affecting participation of faculty in the internationalization of the undergraduate agricultural curriculum. Participants were asked, ―What is the effect (negative or positive) that each of the following could have in the internationalization of the curriculum?" The items used a 1 to 5 Likert response format, ranging from negative, somewhat negative, neutral, somewhat positive, to positive; and included (a) ―Your personal interest (or lack thereof)," (b) ―Relevance (or lack thereof) to your job," (c) ―Student's interest (or lack thereof) in internationalized curricula," (d) ―Your international knowledge/expertise (or lack thereof)," and (e) ―Your ability (or lack thereof) to develop internationalized curricula (e.g., you may have the necessary international knowledge but are not sure of how to use it effectively in your classes)." Four items adapted from Schifter (2000), using the same 1 to 5 Likert response format, were added to the previous items. The items, (a) ―Opportunity to develop new ideas," (b) ―Opportunity to improve my teaching," (c) ―Intellectual challenge," and (d) ―Opportunity for scholarly pursuit." Another item, using the same 1 to 5 Likert response format, was adapted from Parker (2003), ―Opportunity to enhance personal self-satisfaction." A total intrinsic motivation score was calculated by adding the points for all the 10 items. Given a response for each item, the lowest possible mean score is 10 and the highest possible mean score is 50. A mean score of 40 or higher indicates high intrinsic motivation. A mean score between 30 and 40 indicates a mild intrinsic motivation. A mean score below 30 indicates low intrinsic motivation.

While instructional faculty members are key to internationalizing the curriculum, institutional support is equally essential (Hayward, 2000; Knight, 2005). Therefore, faculty extrinsic motivational factors are not negligible. To assess U.S. college professors' extrinsic motivational factors in relation to internationalizing the curriculum, eight items were adapted from Navarro (2004). As a continuation of the ten items related to extrinsic motivation, participants were asked, ―What is the effect (negative or positive) that each of the following could have in the internationalization of the curriculum?" The items used a 1 to 5 Likert response format, ranging from negative, somewhat negative, neutral, somewhat positive, to positive; and included (a) ―Release time from teaching (or other duties) for you to internationalize your curriculum,"(b) ―Development and availability of internationalized instructional materials for you to choose from, adapt, and use in your classes," (c) ―Seminars and workshops to assist you in your curriculum development and internationalization efforts," (d) ―More funds for participation in international programs, sabbaticals, and other related professional development opportunities," (e) ―More funds to support curriculum development and internationalization for on-campus courses (e.g., infusion, international subject matter courses)," (f) ―More funds to support curriculum development and internationalization

for off-campus courses (e.g., study abroad, exchange program)," (g) ―Including your participation in internationalization efforts in your evaluation processes (salary increases, tenure, promotion)," (h) ―More funds to support student participation in internationalized programs." Two additional items were adapted from Schifter (2000). The items used the same 1 to 5 Likert response format, and included, (a) ―Recognition, support and encouragement from dean or chair," and (b) ―Expectation by institution that faculty participate in global education initiatives." A total extrinsic motivation score was calculated by adding the points for all the 10 items. Given a response for each item, the lowest possible mean score is 10 and the highest possible mean score is 50. A mean score of 40 or higher indicates high extrinsic motivation. A mean score between 30 and 40 indicates a mild extrinsic motivation. A mean score below 30 indicates low extrinsic motivation.

A panel of 10 college professors was conveniently identified to review and provide feedback about the clarity of the survey instruments. Each selected participant received an email with information about the study, a link to the survey as well as related instructions. The panel had an 88.4% agreement and an average item rating of 4.02 on a five point scale.

Population, Sample, and Data Collection

The population of the study is represented by professors (assistant professor, associate professor, and full professor) of colleges and universities in the United States. According to the U.S. Department of Education, in 2005 there were 593,095 instructional faculties, including 169,192 professors, 138,444 associate professors, 159,689 assistant professors, 98,555 instructors, and 27,215 lecturers in the U.S (U.S. Department of Education, 2007). This does not include non-instructional faculties.

The National Center for Education Statistics reported the existence of more than 4,000 degree-granting institutions, in 2006 - 2007 (U.S., 2007). This includes regionally accredited and non-regionally accredited post-secondary institutions. According to *US News and World Report* (2008), there are 1,418 regionally accredited colleges and universities in the United States, including 262 national universities (18%), 572 university-masters'(40%), 265 liberal arts colleges (19%), and 319 baccalaureate colleges (23%).

Participants in this study were selected through a random sampling. With alpha of 0.05, a small effect size of 0.20, and a power of .95, a sample size of 384 participants was retained based on McNemar sample size table[2]. The sample size of 384 U.S. college professors was selected from a population of 593,095 full-time instructional faculty members and was confirmed through the Survey System sample size calculator[3], using a confidence level of 95% and a confidence interval of 5. However, to increase the

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[2] http://amchang.net/StatTools/SSizMcNemar_Tab.php
[3] http://www.surveysystem.com

probability of a higher survey response rate, a larger sample of 1400 participants was selected.

First, an excel file listing in alphabetic order all the 1418 accredited institutions ranked on the U.S. News and World Report education ranking website (http://www.usnews.com). A total of 18 institutions were excluded because they no longer exist. Therefore, the number of colleges and universities concerned by the study became 1400. Two additional columns were added to include (a) the total number of college professors per institution, (b) and a cumulative frequency of college professors for the 1400 institutions. Then, a random sample of one college professor per institution was selected based on random numbers generated through the SAS software (SAS Student learning edition 4.1). In other words, 1400 U.S. college professors were randomly selected to receive the survey. Data were collected through a web-base survey monkey system during a period of 6 weeks. A response rate of 29.85% was derived by dividing the number of responses received (n=418) by the total number sent (N=1400). The profile of the participants consisted of 60% male and 40% female, including 28% professors, 23% of associate professors, and 27% of assistant professors (U.S. Department of Education, 2009).

Results and Data Analysis

The data were screened for accuracy and missing values. Data related to participants' income levels were dropped due to missing values. There was no other pattern of missing data. Assumptions for statistical analyses were assessed. A two-tailed alpha level of .05 was set a priori and used for all statistical tests. The data were examined for reliability (Chronbach's alpha) and normality (i.e. skewness and kurtosis). Cronbach's coefficient alpha (a) was used to measure the internal consistency reliability of the Motivation for Internationalizing Curriculum Scale (MICS). The Cronbach's coefficient alpha values were .90 for intrinsic motivation, and .92 for extrinsic motivation

The five dominant intrinsic motivational factors that will have positive or negative (lack thereof) effects on the internationalization of the curriculum by U.S. college professors were: (a) Intellectual challenge ($M = 4.20$, $SD = .85$); (b) Opportunity to improve one's teaching ($M = 4.13$, $SD = .88$); (c) Personal interest or lack thereof ($M = 4.12$, $SD = 1.02$); (d) Opportunity to develop new ideas ($M = 4.12$, $SD = .98$); and (e) Opportunity to enhance personal self-satisfaction ($M = 4.00$, $SD = 1.00$).The five dominant extrinsic motivational factors that will have positive or negative (lack thereof) effects on the internationalization of the curriculum by U.S. college professors were: (a) More funds to support student participation in internationalized programs ($M = 4.02$, $SD = 1.10$); (b) Recognition, support and encouragement from dean or chair ($M = 4.01$, $SD = 1.06$); (c). More funds to support curriculum development and internationalization for off-campus courses (e.g., study abroad, exchange program) ($M = 3.88$, $SD = 1.15$); (d) More funds to support curriculum development and internationalization for on-campus courses (e.g., infusion, international subject matter courses) ($M = 3.86$, $SD = 1.21$); and (e) Including a professor participation in internationalization efforts in one's evaluation process (salary increases, tenure, and promotion) ($M = 3.84$, $SD = 1.14$).

Table 2

Summary of Participants' Responses to Motivational Factors' Survey

Items	M	S D
1. Personal interest.	4.12	1.02
2. Relevance to your job.	3.94	1.15
3. Student interest in internationalized curricula.	3.88	1.09
4. Your international knowledge/expertise.	3.92	1.21
5. Your ability to develop internationalized curricula.	3.50	1.34
6. Opportunity to develop new ideas.	4.12	.98
7. Opportunity to improve your teaching.	4.13	.88
8. Intellectual challenge.	4.20	.85
9. Opportunity for scholarly pursuit.	3.89	1.07
10. Opportunity to enhance personal self-satisfaction.	4.00	1.00
11. Release time from teaching (or other duties) for you to internationalize your curriculum.	3.38	1.35
12. Development and availability of internationalized instructional materials.	3.58	1.26
13. Seminars and workshops to assist you in your curriculum development and internationalization efforts.	3.62	1.18
14. More funds for participation in international programs, sabbaticals, and other related professional development opportunities.	3.79	1.34
15. More funds to support curriculum development and internationalization for on-campus courses.	3.86	1.21
16. More funds to support curriculum development and internationalization for off-campus courses.	3.88	1.15
17. Including your participation in internationalization efforts in your evaluation process (salary increases, tenure, and promotion).	3.84	1.14
18. More funds to support student participation in internationalized programs.	4.02	1.10
19. Recognition, support and encouragement from dean or chair.	4.01	1.06
20. Expectation by institution that faculty participate in global education initiatives.	3.68	1.21

Note. n = 418

Analysis of variance revealed a significant difference for intrinsic motivational factors among assistant or associate professors, and full professors, $F (2, 415) = 4.54$, $p = .011$. A post-hoc comparison test, using the Tukey procedure showed statistically significant pairwise comparisons for intrinsic motivational factors, with p-values of less than .05. The mean differences revealed that assistant professors ($M = 40.44$, $SD = 7.15$) and associate professors ($M = 40.33$, $SD = 8.37$) received higher mean scores on intrinsic motivational factors than full professors ($M = 37.88$, $SD = 7.41$). There was no significant difference in mean scores on extrinsic motivational factors among

assistant professors, associate professors, and full professors, F (2, 415) = .026, p = .975.

Discussion

This study confirmed some of the findings from previous research on intrinsic and extrinsic motivational factors of U.S. college professors. As in this study, Sanderson, Phua, and Herda (2000) found that U.S. college professors are intrinsically motivated by their challenging work environment. Other studies have also revealed that intellectual challenge (Wolcott & Betts, 1999), opportunity to improve one's teaching (Rockwell, Schauer, Fritz & Marx, 1999; Schifter, 2000), personal motivation (Marlon, 1999), opportunity to develop new ideas (Schifter, 2000; Wolcott & Betts, 1999), and opportunity to enhance personal self-satisfaction (Parker, 2003) are intrinsic motivational factors for U.S. college professors. On the other hand, studies found that financial support (Buchheil, Collins, & Collins, 2001) and tenure, promotion, and salary increase (Buchheil, Collins, & Collins, 2001; Chen, Gupta, & Hoshower, 2004) were extrinsic motivational factors for U.S. college professors.

Also, the dominant intrinsic motivational factors of U.S. college professors underscore the existence of opportunities for instructional faculty engagement in implementing global education goals. Higher education administrators can develop policies and design programs that relate to the intrinsic motivation of instructional faculty with respect to intellectual challenge, opportunity to improve teaching, personal interest, opportunity to develop new ideas, and opportunity to enhance personal self-satisfaction. The extrinsic motivational factors of U.S. college professors also provide room for administrators of higher education institutions to influence instructional faculty engagement in global education initiatives through extrinsic rewards linked to (a) more funds to support student participation in internationalized programs, (b) recognition, support and encouragement from dean or chair, (c) more funds to support curriculum development and internationalization for off-campus courses (e.g., study abroad, exchange program), (d) more funds to support curriculum development and internationalization for on-campus courses (e.g., infusion, international subject matter courses), and (e) including faculty participation in internationalization efforts in their evaluation processes (e.g. salary increases, tenure, and promotion).

The dominant intrinsic and extrinsic motivational factors of U.S. college professors toward internationalizing curriculum confirm one of the assumptions of the theoretical framework of this research study. The assumption was that a combination of intrinsic and extrinsic factors explains the motivation of U.S. college professors. The first intrinsic motivational factor is a motivating factor related to the work itself, ―intellectual challenge.‖ The first extrinsic motivational factor refers to a hygiene factor linked to the working conditions, ―more funds to support student participation in internationalized programs.‖ Similarly, there are other dominant factors that relate to motivating factors (e.g. opportunity to enhance personal self-satisfaction; recognition, support and encouragement from dean or chair) or hygiene factors (e.g. more funds to support curriculum development and internationalization for on-

campus courses; including participation in internationalizing efforts in evaluation processes). As Herzberg et al. (1959) indicated, the motivators identified are essential to motivate college professors toward internationalizing curriculum. The hygiene factors are inhibitors that can hinder efforts to internationalizing curriculum.

Administrators of higher education must address both the motivating and hygiene factors, because they are interconnected. For example, one of the dominant extrinsic motivational factors found in this study was ―including participation in internationalization efforts in evaluation processes (e.g. salary increases, tenure, and promotion).‖ This extrinsic factor has implication related to salary (hygiene factor), policy and administration (hygiene factor), and advancement (motivating factor). In other words, an extrinsic motivational factor can be at the same time an intrinsic motivational factor. Inversely, an intrinsic motivational factor can be strongly interconnected to an extrinsic motivational factor. For example, instructional faculty members may recognize the intellectual challenge offered by implementing global education initiatives (motivating factor) or the opportunity to develop new ideas (motivating factor) or embrace the opportunity to improve one's teaching (motivating factor), yet still decide not to participate in these efforts if such involvement is perceived to delay individual progress toward earning tenure status (hygiene factor). In addition, the study revealed that recognition, support, and encouragement from dean or chair are strong motivational factors toward instructional faculty involvement in internationalizing curriculum. Overall, the MICS revealed to be a reliable instrument to assess intrinsic and extrinsic motivation of faculty toward internationalizing the curriculum. However, it must be used in future studies either alone or in combination with other scales for additional validation.

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A CAPSULE OF THE HISTORY AND PHILOSOPHY OF ANDRAGOGY to 2010

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ABSTRACT*:* This paper on the History and Philosophy of Andragogy is mainly limited [with a few exceptions] to a chronological history and the accompanying philosophy of andragogy, in line with when the English language documents were published and personal descriptions of events were written down. Some of these documents, however, present aspects of the events and ideas which recount the years and contexts prior to the time in which they appeared in published form. To date, more than 300 documents have been discovered, but space limitations in this paper allowed the inclusion of only a fraction of that number. Each of 14 time periods are articulated with selected works.

Early Appearances of Andragogy, 1833-1927

The term _andragogy', as far as we know, was first authored by Alexander Kapp (1833), a German high school teacher. In the book entitled _*Platon's Erziehungslehre'* (*Plato's Educational Ideas*) he describes the lifelong necessity to learn. He turns his attention to adulthood – Andragogy or Education in the man's age [a replica of this may be viewed at the following website: *http://www.andragogy.net*]. According to Reischmann (2004), the term andragogy lay fallow for many decades. Nonetheless, in the 1920s Germany became a place for building theory and another German, Rosenstock-Huessy (1925), resurrected the term. He posed andragogy as the only method for the German people and Germany, dispirited and degenerated in 1918 after World War I, to regenerate themselves and their country. He suggested that all adult education (andragogy), if it is to achieve anything original that shapes man, which arises from the depths of time, would have to proceed from the suffering which the lost war brought them.

About the same time, Lindeman (1926) from the USA traveled to Germany and became acquainted with the Workers Education Movement. He was the first to bring the concept to America that andragogy is the method for teaching adults. The term was published in English only a few times in the first 100 years it existed. However, the use of andragogy increased in the almost eighty years that followed, which brings us up to the writing of this article.

Andragogy's Second American Appearance; Foundation Established, 1964-1970

Another extensive period of time elapsed until the term andragogy was published in English. This time, it appeared in Great Britain. Simpson (1964) proposed and issued a call that andragogy could serve as a title for an attempt to identify a body of knowledge relevant to the training of those concerned with Adult Education. Knowles (1970) indicated that he acquired the term in 1967 from Dusan Savicevic. [It was actually in 1966 (Sopher, 2003)]. However, after becoming acquainted with the term, Knowles

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infused it with much of his own meaning garnered from his already extensive experience in adult education.

Movement Toward Applying Andragogy to Human Resource Development, 1971-1973

Furter (1971), from France, proposed that universities recognize a science for the training of man to be called andragogy. The purpose would be to focus not on children and adolescents, but on man throughout his life. Ingalls (1972) provided the first handbook guide to using andragogy in helping adult educators [they called them ‗trainers' in those days] become more systematic and consistent in their engaging learners in the learning process. This was developed and tested in a branch of the US Government. Knowles (1973) focused a full application of his conception of andragogy toward the Human Resource Development (HRD) Movement. He worked vigorously in the corporate sector and thus saw the importance of testing and relating andragogy within it.

Emergence of Self-Directed Learning Skills as a Major Way to Implement Andragogy, 1975-1981

Knowles (1975) published his guidebook for learners and teachers on the topic of *Self-Directed Learning* relating it to Andragogy. For him, andragogy was the underlying philosophy, and self-directed learning was a means to implement andragogy. Hadley (1975) in his Doctoral Dissertation at Boston University developed and validated an instrument for assessing an adult educator's andragogy and pedagogy orientation. The instrument was labeled as the Education Orientation Questionnaire (EOQ). Kabuga (1977), an adult educator from Africa, advocated using highly participative teaching/learning techniques with children. He was quite committed to and convinced of the value of the andragogical idea in all education. Mezirow (1981), developed a critical theory of adult learning and education, and laid the groundwork for what he called a charter for andragogy. This included the core concepts that would enhance adults' capability to function as self-directed learners. Suanmali (1981), a doctoral student of Mezirow, focused his dissertation research on Mezirow's charter for andragogy. He found support and agreement among 174 adult education professors and practitioners for andragogy.

Strengthening the Numerous Uses of Andragogy Along with Growing Controversy and Resistance Toward it, 1981-1984

Christian (1982) provided the andragogical perspective of assessing the Student's Orientation Questionnaire (SOQ). This instrument was based upon Hadley's (1975) Educational Orientation Questionnaire (EOQ).Allman (1983), who was associated with the Nottingham [UK] Andragogy Group, considered the strong connection between brain plasticity (fluid intelligence) and adult development. She asserted that Mezirow's (1981) and Knowles' (1970, 1980) understanding of andragogy could be linked and merged with her idea.Nonetheless, some lack of enthusiasm about Knowles' andragogy concept was reflected by Hartree (1984). She expressed the feeling that Knowles' andragogy did not

live up to what she interpreted as his desire for its becoming a comprehensive learning theory for adult education. Jarvis (1984) wrote that the theory of andragogy had moved into the status of an established doctrine in adult education. However, he thought it did not have the grounding in sufficient empirical research to justify its dominant position. Not to be deterred at this point, Knowles (1984) presented the first book in which he cites thirty-six extensive case examples of applying andragogy in practice. In it he revealed what worked and what did not.

Identifying the Stronger European Base of Andragogy in Comparing it with the American Base, 1985-1988

Young (1985) perceived the European concept of andragogy as being more comprehensive than the American conception. He considered that most Europeans do not use the terms andragogy and adult education synonymously. Taylor (1986) offered a very strong and articulate research based model for the andragogical process of transition into learning for self-direction within the classroom from the learners' point of view, with various phases on a cycle of what may be characterized as a cultural journey. Ross (1988) connected the concept of andragogy and its value with some of the research on teacher effectiveness. He believed that teachers' behavior relates to student achievement. Davenport (1987) questioned the theoretical and practical efficacy of Knowles' theory of andragogy, suggesting that adult education would simply be better off to drop the word from its lexicon.

The Foundation of Trust Undergirds Andragogical Learning Despite the Andragogy Debate, 1989-1991

Henschke (1989) developed an andragogical assessment instrument entitled, Instructional Perspectives Inventory (IPI). The central and strongest major core of this instrument was originally and still is a focus on the teacher trust of learners. Nadler (1989) stated that Human Resource Development (HRD) is based in learning, and every HRD practitioner should have an understanding of the theories of Adult Learning. This was a crucial observation, because many in HRD have overlooked that consideration. Krajinc (1989) perhaps provides the most beneficial definition of andragogy. She states, ―Andragogy has been defined as…'the art and science of helping adults learn and the study of adult education theory, processes, and technology to that end' ” (p. 19). Long (1991) speculated that although Knowles' form of andragogy is weak in empirical confirmation, it has survived the criticism leveled against it. Two reasons are that Knowles is a leader in the field and is widely respected for other contributions.

Scientific Foundation of Andragogy Being Established Amid Skepticism and Misunderstanding, 1991-1995

Savicevic (1991) provided a critical consideration of andragogical concepts in five western European Countries, and five eastern European Countries. He also drew on sources from ancient times. This comparison showed common roots and indicated endeavors toward andragogy as a fairly independent scientific discipline. Additionally,

he credited J. A. Comenius in the seventeenth century with being regarded the founder of andragogy. At this time, there was again strong criticism of American andragogy, and that coming from Candy (1991) in Australia. At the time Knowles articulated andragogy, self-expression and personal development were in vogue. Thus, self-directed learning and andragogy were gaining some prominence in becoming known as autonomous learning. Houle (1992) in contrast, emphasized the impact of Knowles on American andragogy, and how he worked this out in practice especially in non-school settings and the workplace. He went on to indicate that scholars and theorists may find great value in Knowles' discussion of the development of learning theories in the educational literature, and his exploration of the roots of his own thinking about theorizing.

Kaminsky (1993) suggested that whether we have knowledge for naming something academically or not, we may still be practicing pedagogy, andragogy, or any other ‗gogy' or ‗ism'. This is the reason she selected that idea from Hooks (1994). Kaminsky finds Mr. Ferro's remarks snobbish and exclusionary sounding as it appears that he does not want anyone, other than ‗linguists', to try and name the world, or even to make up new ways of naming things. She argues that he wants that job to belong to the expert name-makers, who, it seems, can never be adult educators, let alone people who have never seen the inside of a college or high school. Hooks (1994) said ―the possession of a term does not bring a process or practice into being: concurrently one may practice theorizing without ever knowing/possessing the term…" (p. 61). It is sometime later that this kind of practice is given a label that comes into common use.

Poggeler (1994) listed trends which he hopes will be helpful for future development of European andragogical research, which include at least international knowledge, ―development andragogy" of the Third World, and understanding the ―lifeworlds" of the participants. Zmeyov (1994) clearly supported andragogy. He stated that the most important trend in adult education in Russia is the application and further development of Knowles' (1970, 1980) theory of adult learning, or andragogy. Milligan (1995) scientifically investigated andragogy. He conceptualizes his summary of it as the facilitation of adult learning, most notably used in nursing education, has elements of andragogy within it. Henschke (1995) focused on describing a dozen different episodes with groups in various settings. He successfully applied his understanding and adaptation of Knowles' theory of andragogy.

Momentum Gained Against Andragogy While Counter Arguments Assert its Value, 1995-1998

Welton (1995) asserts that ―the ‗andragogical consensus'…formulated by the custodians of orthodoxy in the American Commission of Professors in the 1950s and solidified by Malcolm Knowles and others in the 1960s and 1970s, has unraveled at the seams" (p. 5). He articulated that the fundamental accusations expressed are because this perspective inadequately serves the interests of the disenfranchised in North American society. Van Gent (1996) asserted that andragogy has been used to designate the education of adults. He considered that its future lies only as a generic term for adult education. Hanson (1996), from the other side of the discussion, called for adult educators not to search for a

separate theory of adult learning [andragogy]. He suggests that we remove many of the unsubstantiated assumptions based on almost utopian beliefs about the education and training of adults linked to un-contextualized views of learning and empowerment.

Houle (1996) talks about Knowles' work in andragogy. He said that it remains the most learner centered of all patterns of adult educational programming around the globe. Rostad (1998) outlined the library of the Nordic Folk Academy as a meeting place and an information center specialized in non-formal adult education, adult learning and andragogy. It applies andragogy to avoid any adults being marginalized.

Antecedents to an Historical Foundation of Andragogy Being Extended and Broadened, 1998-2000

Henschke (1998a) asserted that long before the term andragogy appeared in published form in 1833, ancient Greek and Hebrew educators used words that were antecedents to andragogy. His definition of andragogy moved in the direction of calling it a scientific discipline. Zmeyov (1998) aptly defined andragogy differently from others. He said that andragogy is ―the theory of adult learning that sets out the fundamentals of the activities of learners and teachers in planning, realizing, evaluating and correcting adult learning" (p. 106). Draper (1998) presented an overview of the historical forces influencing the origin and use of the term andragogy. He concluded, ―Tracing the metamorphoses of andragogy/adult education is important to the field's search for identity." (p. 24). Henschke (1998b) also emphasized that, in preparing educators of adults, andragogy becomes a way of being or an attitude of mind, and needs to be modeled/exemplified by the professor. Otherwise, if we are not modeling what we are teaching, we are teaching something else. Further, Hoods(1998) perceived andragogy, as related to wilderness teaching, being based on four environmental influences interacting in every being: External (Physical); Internal (Physical); External (Spiritual); and, Internal (Spiritual).

The most comprehensive of all the publications on andragogy is a book that includes thirty of Savicevic's (1999) publications within a twenty-six year period. His work has addressed how andragogy has and will shape all aspects of adult education. Boucouvalas (1999) insisted that refined methodological or epistemological tools and indicators are critical for sound research in comparative andragogy. However, the role and influence of the ‗self' of the researcher in the research process, is an equally critical element to be considered. Savicevic (1999) indicated that Knowles was inconsistent in determining andragogy and thus had caused much confusion and misunderstanding. The most glaring mistake of Knowles was that he declared andragogy as a ‗model' for teaching even in pre-school, thus moving it away from just applying to adults. It has been suggested by Savicevic (1999) that andragogy is defined as a scientific discipline. Thus, it deals with problems relating to HRD, Adult Education, and learning in all parts of a person's life.
Osborn (1999) declared that andragogy has the potential to play an important role in distance learning. However, she found that students need to be coached to understand the teacher's expectations. Henschke (1999) explored the gap between ‗learning' and ‗performance' within the andragogy concept relating to Adult Education and Human

Resource Development [HRD]. He concluded that the two distinct terms together are different sides of the ‚same coin'; and their close relationship is the key to HRD.

Savicevic (2000) also explored various antecedents to and backgrounds of andragogy before the term came into publication. In this he added another component to the scientific foundation of andragogy. Ovesni (2000) proposed three research concepts and models of andragogues' professional preparation based upon scientific research in andragogy: model of professional preparation of andragogical personnel of general profile; model with viable tendency toward distinction; and, models of diversification with respect to the field of the system of adult education, i.e. the scope of the system and with respect to institutions and associations within which the process of education is performed.

Reischmann (2000) indicated that in 1994 he changed the Otto Freiderick University, Bamberg, Germany, ‚Chair of Adult Education' to ‚Chair of Andragogy'. His understanding differentiates ‚andragogy as the research' and ‚adult education as the practice' in the education and learning of adults. Johnson (2000) applied and tested andragogy as an approach to learning that includes a focus primarily on the needs of the learner in every aspect of his/her life. He also asserted that given most, if not all definitions in the social science literature, andragogy could qualify as a theory or at least an emergent theory.

Empirical Research Being Pressed for Investigating Andragogy's Value While Objection Remains, 2000-2003

Billington (2000) found that with sixty men and women, there were a number of key factors related to implementing andragogy: (a) a class environment of respect; (b) their abilities and life achievements acknowledged; (c) intellectual freedom, self-directed learning, experimentation and creativity encouraged; (d) learners treated fairly and as intelligent adults; (e) class as an intellectual challenge; (f) interaction promoted with instructor and between students; and, (g) regular feedback from instructor. If these factors were present, it helped them grow, or if they were absent, it made them regress and not grow.

To the arguments questioning the value of Knowles' approach to andragogy, Maehl (2000) addresses the philosophical orientations of a number of adult educators. He suggests that Knowles led in the direction of making andragogy quite humanistic that gained wide adoption in the field.

While Grace (2001) considered that Knowles' andragogy as a theory of how adults learn was losing much of its punch by 1990 as a result of the discussion and controversy surrounding it, and that Knowles' perspective is too much caught up with extraneous matters, Mason, et al. (2001) indicated that air carrier check airmen could benefit greatly from Henschke's (1987) andragogical model in their preparation for becoming instructors in the pilot learning program. Most especially, they considered implementation of the plan will help pilot instructors display flexibility in their approach. Merriam (2001) also

posited that the scholarship on andragogy since 1990 has taken two directions. One stream seeks the establishment of a scientific discipline. The other stream critiques andragogy as being de-contextualized. She emphasized that andragogy is one of the major ‗pillars' of adult learning theory.

Cooper and Henschke (2001) showed the continuing discovery and expansion of a much broader conception of andragogy than Knowles'. It was then published in the Serbian Language, in the Andragogy Journal in Yugoslavia to an audience largely acquainted with andragogy in one of its most pure forms, as it is credible in the University of Belgrade. Rachal (2002) clearly identified seven criteria suitable for implementation in future empirical studies of andragogy. Those criteria are: voluntary participation, adult status, collaboratively-determined objectives, performance-based assessment of achievement, measuring satisfaction, appropriate adult learning environment, and technical issues. Kajee (2003) reported on the impact of using andragogy with English as a Second Language (ESL) in a South African university. This approach had a positive bearing on learner autonomy and self-directedness. Haugoy (2003) identified andragogy closely with various models of flexible open classrooms for the independent students in many countries. These models go back more than a century to Bishop Grundtvig's life path.

Bringing European and American Andragogy Closer Together As Distance Education Emerges, 2003-2004

By this time a connection was emerging between andragogy and distance education. Simonson, et al. (2003) identified a number of characteristics needed in distance education systems designed for adults that are derived from Knowles' concept of andragogy: (a) the physical environment of a television classroom used by adults should enable them to see what is occurring, not just hear it; (b) the physiological environment should be one that promotes respect and dignity for the adult learner (adult learners must feel supported, and when criticism is a part of discussions or presentations made by adults, it is important that clear ground rules be established so comments are not directed toward a person, but concentrate on content and ideas); (c) a starting point for a course, or module of a course, should be the needs and interest of the adult learner; (d) course plans should include clear course descriptions, learning objectives, resources, and timelines for events; (e) general to specific patterns of content presentation work best for adult learners; and, (f) active participation should be encouraged, such as by the use of work groups, or study teams.

Andragogy showed the strength through its long history in Europe according to Savicevic (2003). He indicated that comparative andragogy has numerous elements that are essential in addressing this scientific research topic.. Sopher (2003) asserted that Knowles' work is best understood by practitioners and researchers only if certain rules are observed; namely, it is accurate, humanistic, contextual. Equally important is to recognize the role that adult education movements in the USA play in Knowles' theory of andragogy: How he influenced and was influencd by them,

Nevins (n.d., circa, 2003) asserts that successful business leaders are masters of andragogy. They need to quickly gather the facts and make decisions. Wie (2003) articulated the aims, needs, motivation, skills, self-confidence, learning conditions and responsibility of learners in andragogy. These andragogical principles guarantee learning success and quality of adult learning. Drinkard and Henschke (2004) found contrasts in nurse educators. Those who have a doctoral degree in other than nursing (andragogy to be specific) are more trusting of their learners in the classroom than nurse educators who have a doctoral degree in nursing. Reischmann (2004) added some historical perspective to the scientific basis of andragogy. This related to whether a term such as ―andragogy" was necessary, or that the field of adult education has been or will be able to flourish and do its work without a unique term. Illeeris, (2004) is not an andragogue, but a pedagogue. He indicated that he is quite in line with Knowles' agitation for andragogy as a discipline, which is different from the pedagogy of children's schooling and upbringing. Merriam (2004) has questions about whether andragogy is a theory. Nonetheless, she asserted that certainly andragogy is here to stay as one of the major landmarks in the development of adult learning theory.

The Hesitation Concerning Andragogy Continues While Many Still Stand By Andragogy, 2005-2006

Sandlin (2005) admitted that andragogy was a cornerstone of adult education for many decades. Notwithstanding, she has serious reservations about its prominence, and critiques it within the Afrocentric, feminist, and critical adult education perspectives. Stanton (2005) related the andragogical concept to the concept of readiness for self-directed learning. There was not only congruence between the two, but also the Henschke (1989) Instructional Perspectives Inventory [IPI] was validated as an almost perfect ‗bell-shaped' measurement of an andragogical facilitator. Reischmann (2005) made a clear distinction in his definition between andragogy and adult education. He defined andragogy as the science of the lifelong and lifewide education/learning of adults. Adult education is focused on the practice of the education/learning of adults. Another use of the principles of andragogy is in the public school setting. The purpose of Stricker's (2006) research was to determine the attitudes of principals toward teachers as learners. He found a gap between how the principals viewed themselves and how the teachers viewed them. Wilson's (2006) research had turned into a book that was published. This was regarding the historical emergence and increasing value of brain research and andragogy in Germany and the USA.

Knowles' Prominent Long Range Contribution to Andragogy's Continuance Into The Future, 2006-2009

Savicevic (2006a) has been working in andragogy for a half-century. He observed that since his first visit to the USA in 1966, up through 2006, the identifiable trace of andragogy on USA universities is that there had not been a single serious study on adult education and learning that did not refer to andragogy as a conception. Isac (2006) analyzed that in their efforts in Romania to innovate, adult education/andragogy was completely neglected during the Communist Regime from 1945 to 1989. He recognized

that it would now take much to renew these valuable andragogical traditions according to contemporary imperatives of the European Union.

As if seeking to culminate and bring together all these valiant efforts, Savicevic (2006b) does a thorough historical tracing of the converging and diverging of ideas on andragogy in various countries. He seeks to help lay a scientific research foundation for andragogy being the studying of the learning and education of adults. Savicevic also reflected about his perception of Knowles' position in sustaining andragogy over the long range of its history into the future.

> Forty years in development of a science is not a long or ignorable period. I met professor Knowles four decades ago and argued on term and on concept of andragogy. Since then, the term and the concept of andragogy enlarged and rooted in the American professional literature. There is no doubt that Knowles contributed to it, not only by his texts, but with his spoken word and lectures. He was a _masovik', i.e. a lecturer on mass events. He told me that he lectured on 10,000 visitor stadiums. As if he was inspired by an ancient agonistic spirituality! His contribution to the dissemination of andragogical ideas throughout the USA is huge. The history of andragogy will put him on a meritorious place in the development of this scientific discipline. (p. 20)

Although Newman (2007) declared he was not a fan of andragogy, he said that in his estimation Knowles had contributed something to adult education and andragogy that was quite unique. As he thought it through, he came to the conclusion that Knowles provided a means to assess the needs of adult learners, and he could not detect that any other adult educators provided such. They only had talked about assessing adult learner needs. Isenberg, (2007), provides a break-through framework for bringing together the interaction of andragogy and Internet learning. She presents a dynamic design to meet the goal of the International Commission on Adult Education for the Twenty-first Century, focusing on five pillars of lifelong learning: To know, to do, to live together, to be, and to change. Cooper and Henschke (2007) present a fully documented perspective on andragogy which has been absent from all previous author's published discussions. This has been an open and up-front facing of a topic (andragogy) that by many has been considered unimportant to the adult education field.
Boucouvalas (2008) highlighted the emphasis that Knowles gave to group / community / society in his treatment of andragogy. Earlier perspectives on the purpose of adult learning included its serving a higher purpose than just the individual. Vodde (2008) found that while a traditional, pedagogical, military model of training may have at one time served the needs and interests of police and society, its applicability and efficacy has been called into question. It was theorized that an andragogical (adult based) instructional methodology will serve as a more effective means for training police recruits. Pleskot-Makulska (2009) presented a paper on andragogy at the Commission on International Adult Education (CIAE) Pre-Conference of the American Association for Adult and Continuing Education (AAACE) Conference, November, 2009, in Cleveland, Ohio. Her excellent paper also appeared in the Proceedings of that Conference. To make certain her

paper is represented accurately, following is a quote from the abstract she provided of that paper.

> In recent times steps are being taken to strengthen the position of andragogues in the job market in Poland. The presentation is centered around the system for their training in that country, with focus on education undertaken as part of the andragogical specialization at the Faculty of Education at the University of Warsaw. (p. 143)

Conclusions on the History and Philosophy of Andragogy

This paper represents a History and Philosophy of Andragogy around the world, based on numerous English language documents. There are a total of more than 300 English Language documents identified for the broad research on andragogy through 14 time periods. Only a fraction of these documents are included in this work. Two Hundred more are waiting to be included in further iterations of this research. Nonetheless, andragogy is not just the work of one or a few persons, but is the result of efforts by multiple people from numerous nations around the globe. The reader is invited to join that effort. Please contact the author at the e-mail address provided on the first page of this article.

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TOWARD AN ACTIVE AGEING SOCIETY: VALUE RECONSTRUCTION AND PERFORMANCE EVALUATION OF PROFESSIONAL WORKERS

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ABSTRACT: Due to the rapid changes in the ageing society in Taiwan, the aim of this article is to discuss the following themes: (a) issues regarding the changing social values among the elderly and the transformation of the ageing image in the society of Taiwan; (b) three new dimensions for elderly and the new image of an ageing society; (c) the five approaches to reconstructing a new social value system; (d) with the above newly-build construction, this study furthermore intends to combine the views from professionalisation to set up a list of indicators for performance evaluation with which the professionals would be able to examine the adult educational organisations in the field. Document analysis, focus group interviews, and Delphi technique were used to gather the types of information and data needed. These methods are also used to design a list of indicators for performance evaluation in adult educational organisations. The results of this study show the types of social values that need to be changed in which elderly should not be regarded as dependants. Instead, they are individuals who still love and are able to devote themselves to the society. As researchers in the field we look forward to seeing more professional workers, with lucid ideas and professional perspectives, creating a decent learning environment for the elderly. Last, the list of indicators for performance evaluation could be widely used as a useful tool in terms of evaluating adult educational organisations in Taiwan.

Introduction: The Changing Values in the Process of Ageing Society

The rapid changes in ageing demographics in the past few decades have been widely discussed worldwide. Many have researched demographic structures, economic security and social welfare, but very few studies have discussed the issues from the perspective of values. We are concerned that if the lack of reflection and reconstruction relevant to changing values remains, the important aspects of ageing issues would not be addressed. What we mean is the discussion would not result in meaningful action when ageing issues are examined.

The Decline of Chinese Filial Piety and the Stereotypes of the Elderly

The society of Taiwan has inherited the virtues of Chinese ideology such as the respect of the young for seniority and honouring the aged and the wise. But now the elderly in the society of Taiwan seem to be losing their social status (e.g. dignity) that they used to have both in the family and society. Also there are tensions between the younger and the older generations. The picture of a harmonious atmosphere in an extended family and the

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joyfulness between the company of grandparents and grandchildren seems to be fading away. Instead, many elderly are losing their power in the family, staying in nursing homes and centres that care for the elderly, which are seen more commonly now than decades ago. It shows that the elderly in Taiwan are facing not only a more complex but also a tougher living environment when they age, such as isolation, loneliness, segregation from other family members, or even abandonment by their grownup children. It is possible to ascribe the above issues regarding the elderly to social changes and economic declines, but do the changing values among the elderly and the general public also play an important role? Moreover, the stereotypes of elderly seem to be rooted in the mind of the general public when the issues of ageing are examined. For the general public, elderly means something negative, such as dependent, stubborn, with a weak memory, and slow-moving. Nor does the society look at the elderly with positive attitudes.

The System Design of Ageing Society

The system design of an ageing society has long been stressed in issues related to economics, health, caring, and social services. Obviously the ideology about respecting the elder, maintaining the traditions, reciprocating, self-dignity, and self-realisation seem to be less commonly seen in Taiwan nowadays. It all has been mistaken that the elderly are treated as dependants. They are completely marginalised in the society. As a result, the elderly are not given the type of learning-oriented environment where they could reach the goals of self-actualisation. Nor do they have the opportunities to equip themselves with knowledgeable life experiences to show the general public that "I am still someone capable, at least in some ways." This study does not try to say that the welfare systems are not as important as it should be when ageing issues are discussed. Instead, ideally, there is a necessity to design a brand new system which combines both welfare and education.

Six Key Issues Needing Resolution in an Ageing Society

We propose that the elderly nowadays are facing the following six key issues:

1. Individual growth and development: including satisfactions of all kinds of learning needs, methods of resolving loneliness, and self-actualisation of life goals (Huang, 2008).
2. Social participation: how does the society provide the types of opportunities for elderly to devote themselves to learning? Also how does the general public look at the participation of elder people both in theoretical and practical ways? In this sense, are elderly encouraged or discouraged?
3. The reconstruction of family relations in terms of morality: how to raise the status of elderly in the family as it used to be? How to build up the types of intergenerational relations, such as a close relationship between grandparents and grandchildren?
4. Human power development upon the elderly: how to draw on human power from retired people? Returning to the job market has become a trend

amongst the retired people (Hu, 2008a, 2008b). How to provide the types of information and resources for those retired people who still want to return to a paid-job?

5. Cultural interruption and inheritance: how could we help the elderly to pass on their splendid life experiences to the society and how could we deliver their wisdom to next generations?

6. The performance evaluation: it provides the types of guidance and ways of doing self-evaluations for adult organisations. It also shows the impact or guidance, before or after the actions are undertaken, on decision-making and results. In the end, the purpose is to let individual efforts be more consistent with organisational goals.

Three Approaches to Creating New Values for Elderly

In this section, we are interested in finding out how we could establish the new values for elderly. We explore the ideas in three approaches:

1. Create the values by the elderly people:

In the ageing society, the elderly should be located in the centre of the entire society. In other words, the elderly could make decisions by themselves rather than by someone else, such as the young people. In such a society, the elderly are able to choose the life style they want, to create their own values, and to fulfill their own dreams. Before reaching these goals, first, the elderly must be capable of judging and making the right decisions. Second, the design system of an ageing society must provide various choices for elderly in terms of values.

2. Create the values for the elderly people:

Values could be created by oneself, be guided by education, or offered by the society. Hence the second approach would be those who are concerned about ageing issues (both state and private organisations). In the society of Taiwan, the state addresses more on the values of medical and health care and welfare services. As a result, the related policies and budgets are gathered into the Department of Health and Department of Social Welfare. The values that have been accomplished by the Ministry of Education thereafter are limited comparatively. For instance, the ―White Paper for Elder Education" was not launched until 2006.

3. Create the values with the elderly people:

The third approach is led by social organisations and elderly; therefore, this is a combination between the first and the second approaches. Here the needs and expectations of elderly are the priority. The social organizations play roles such as adopting the values which are created by the elderly. During the process of creation and adaptation of new values, the experiences and values of elderly are included. Hence, the results should be able to work with the expectations from elderly.

The Ideal Image of an Ageing Society

With regard to the ideal image of an ageing society, first of all, it should be *a society where the elderly could make decisions by themselves and be able to choose freely.* What the society needs to do is to fortify the elderly with three capacities: self-directed learning, self-planning careers, and dealing with daily life by themselves. To some extent, an ideal ageing society provides various choices for the elderly on the one hand. On the other hand, an ideal ageing society needs to think about how to remove the barriers, particularly the most irrational ones, when elderly are making decisions. Besides, an ideal ageing society is comprised by groups of people who care about *the existence of elderly*. These could be younger, older people, or even the elderly themselves. Also the number of people who are equipped with professional knowledge regarding the elderly should be increased steadily. Then, *the numbers of learning centres or organisations should be spread out and be easily reached by the elderly*. Both the access of learning centre and the programmes should be easily approached by the elderly. Lastly, an ideal ageing society is *having a[n] elderly-friendly living spaces and social environment*. The ideal ageing society of the future would be focused on the creation of an elder-friendly, no age-discrimination, and a dignity society.

The Reconstruction of New Value-System on Ageing Society

Reconstruction of a new value-system is called for due to the diversity of policy making and service systems, in which each contains its own way of thinking. Lacking the strength to bring all of the resources together, difficulties arise in uniting the different perspectives. Therefore, a newly constructed value-system which could embrace the differing needs of the elderly and integrate with divergent ways of thinking, from the service systems or policy-making side, in order to better meet the array of needs among the elderly.

The Establishment of Professional and Qualified Ageing Learning Environment

In the value-system of elder education, first, the regulations have to assure learning rights among elderly; second, in the state policies, both the state and the private sectors are expected to provide sufficient learning centres or resources for elderly; third, for implementation it is wise to promote diverse learning programmes in order to meet the needs among elderly; and last, for participation, it should provide all possible inducement and relevant measures such as delivery service and ageing, broadcasting and television programmes in order to encourage those elderly who do not yet participate in learning activities.

Besides, there are three important recommended directions leading to a value-system for elder education: first, full implementation of the ―education for retirement‖; second, ―active ageing education,‖ which helps the elder people embrace an anti-ageing process and live actively; third, ―education to fulfil elder people's dreams.‖ In other words, elder education has to construct a complete educational system in which older adults could have a joyful, healthy life and reach the goals of self-actualisation in the later years.

The Visions and Aims: Elderly could create new social values and aims

The visions and aims regarding the creation of new social values could be divided into five categories: (a) reproduce the positive images and values of elderly: the splendid life experiences and wisdom of elderly should be cherished and valued. These positive images and values of elderly should be reproduced; (b) reinforce the notion of ―respect the elderly": despite the increased numbers of the ageing population, the majority of the population in the ageing society are young and middle-aged. Hence there is a need to retain the notion of ―respect the elderly" as a virtue of our traditions; (c) provide ―learning support system": such as the Senior Learning Centres, including various types of learning programmes, counselling and guidance; (d) ‗re-join social activity': elderly are encouraged to participate, in at least one social activity. This helps the elderly to retain an active life; (e)"interpersonal relations in the ageing community": elderly are encouraged to participate in at least one social institution outside of their own family. This gives elderly the chances to remain in a good relationship with the community where they live.
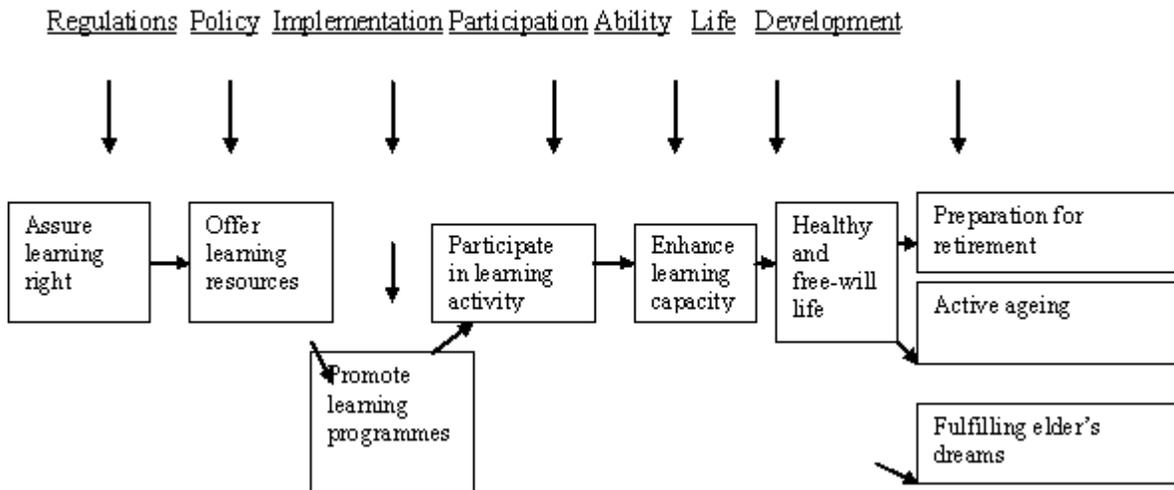
Figure 1. Professionalised and Quality Learning Environment for Elderly
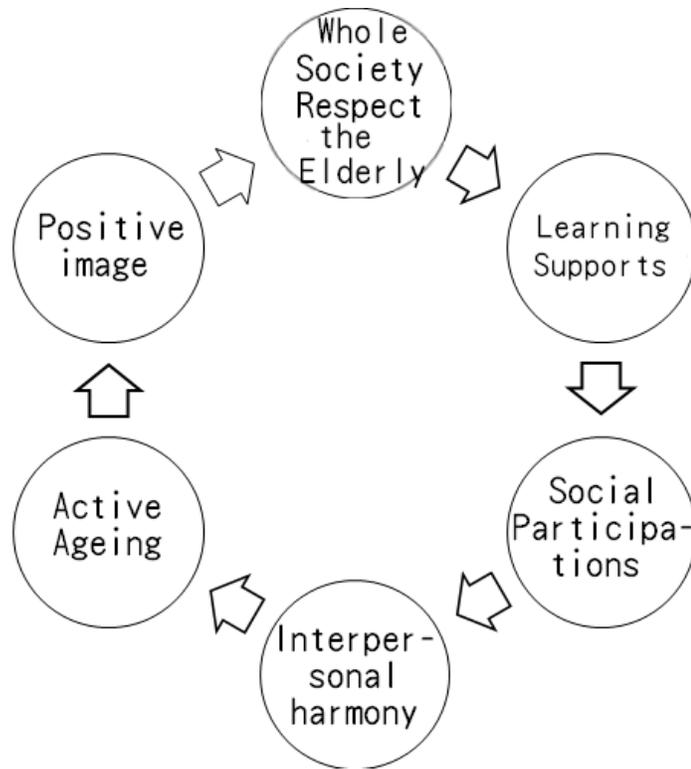
Figure 2. The Visions and Aims of Value-System in Ageing Society

The Recreation of Human Resources: Elderly human power is a new human resource

The elderly are no longer the dependents. Nowadays many elder people still look for opportunities to return to a paid-job. Actually, many of them are willing to pass on their knowledge and experiences to their successors. Hence, there is a demand for building up a new value-system—the recreation of elderly human power.

In that sense there are several issues needing to be examined carefully at different stages: (a) the change of jobs before the retirement of elderly; (b) semiretired: those retired people do not really leave their employment for good; on the contrary, they return occasionally to guide the younger successors. Actually they are the outsiders but still inside of their company and the company retains certain relations with them (Drucker, 2003, translated by Liu); (c) the re-entry after retirement: If one's health condition allows, the state and private sectors should help the elderly transfer to other employment with short-term in-service training in terms of employability. (d) start an enterprise: The state could provide loans and in-service training courses for those elderly who are interested in starting their own enterprises; (e) retire for good." Alternatively, the elderly could reward society by volunteering and gain more satisfaction and fulfilment.

Volunteer training

Help to start an
enterprise

Volunteer in active
learning

Retire for good

Elderly start a
new enterprise

Short training

Start an
enterprise

Outsider in inside
of institution

Experiences
inherit

Semi-retired

Career
guidance

Re-employment

Re-entry

Elderly change

Employed
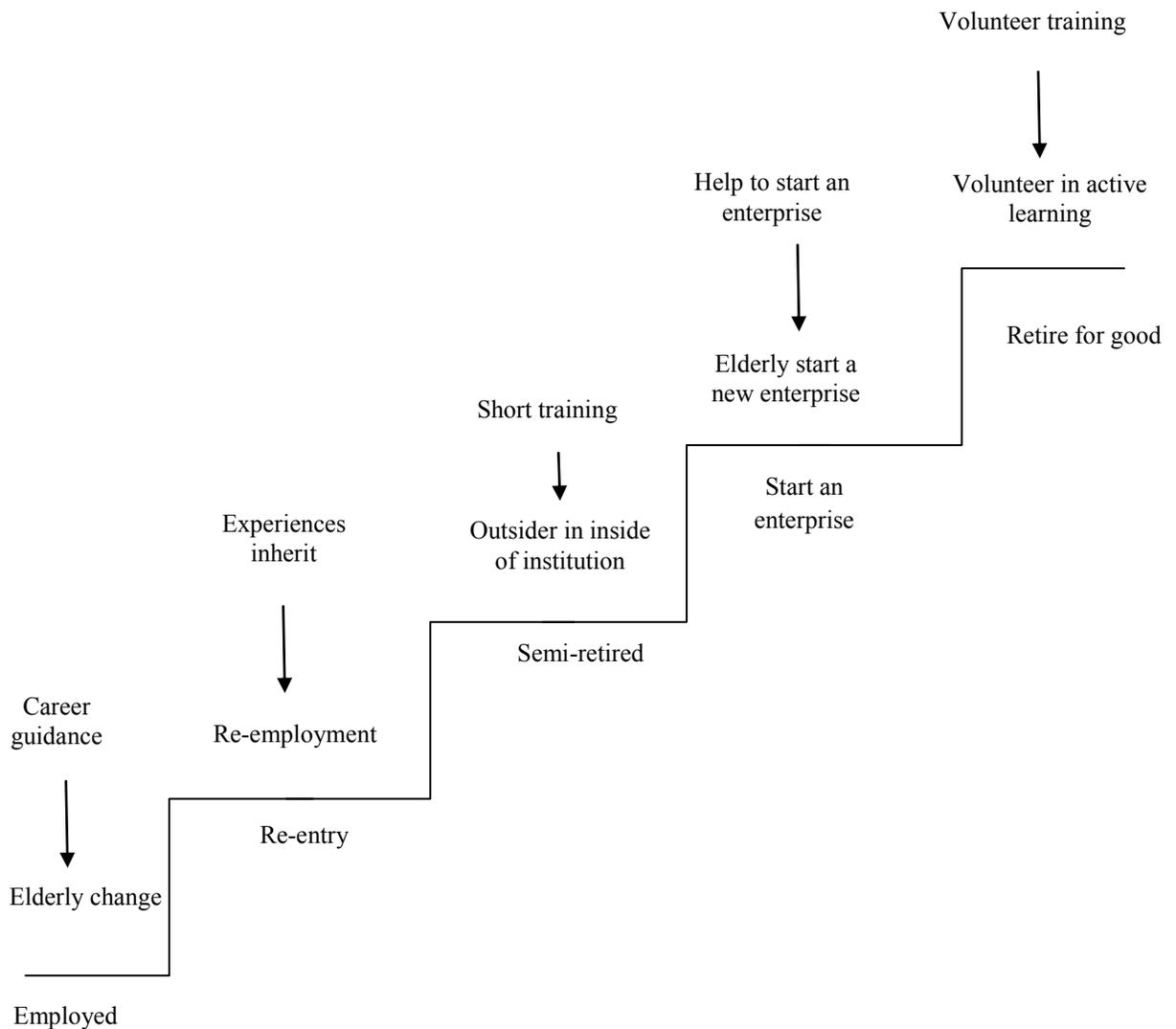
Figure 3. The Recreation System of Elder Human Resources

Cultural Inheritance: The experiences and wisdom of elderly could be inherited by a certified professional system

The cultural inheritance is highlighted among the newly-build value-system for elderly. First, from the cultural aspect, cultural inheritance focuses on dignity of elderly in society. Hence, there are needs to ―dig out talented elderly‖; those with special skills or talents could be collected into an ―Elder Talented Data Bank.‖ Second, build up ―a training-system for adult trainees.‖ Those adult trainees could teach elderly in Community Colleges or Senior Learning Centres. Third, establish a ―certified professional system,‖ the qualifications and capabilities of elderly could be certified with professional recognition. Fourth, ―the reinforcement of intergeneration‖ and ―the achievement display.‖ The ―Elder Talented Data Bank‖ would help pass on experiences to the younger generation. The training system and certification process would include

the involvement all the community colleges and learning centres either to display shows or merchandise the crafts and works to the public. The purposes are to make the elderly feel that they are still useful. Last, ―the inheritance of artistry,‖ schools and social sectors could promote those skills from elderly. From the long-term prospect, this helps to retain the artistry.
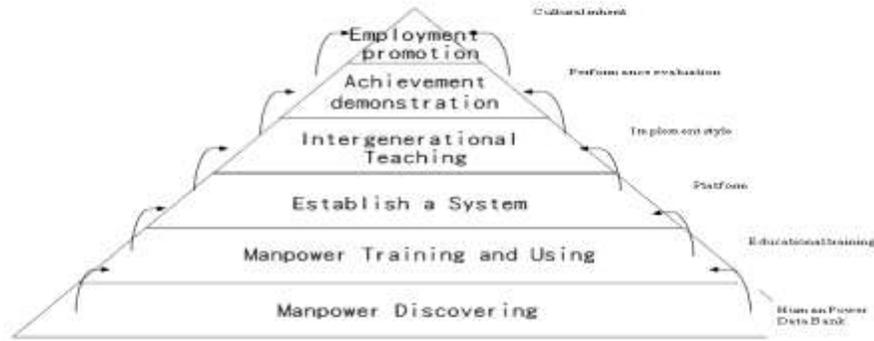
Figure 4. Elderly cultural heritance through a certified professional system

The Emerging Industry with Special References to Elderly

From the economic aspect: ageing society should build on the new values which are the emerging industry with special references to elderly. The needs and shopping interests of elderly are different from the youngsters; it means there are emerging markets and productions needing to be explored. This emerging industry may also change the economic structures and create a new type of social industry.
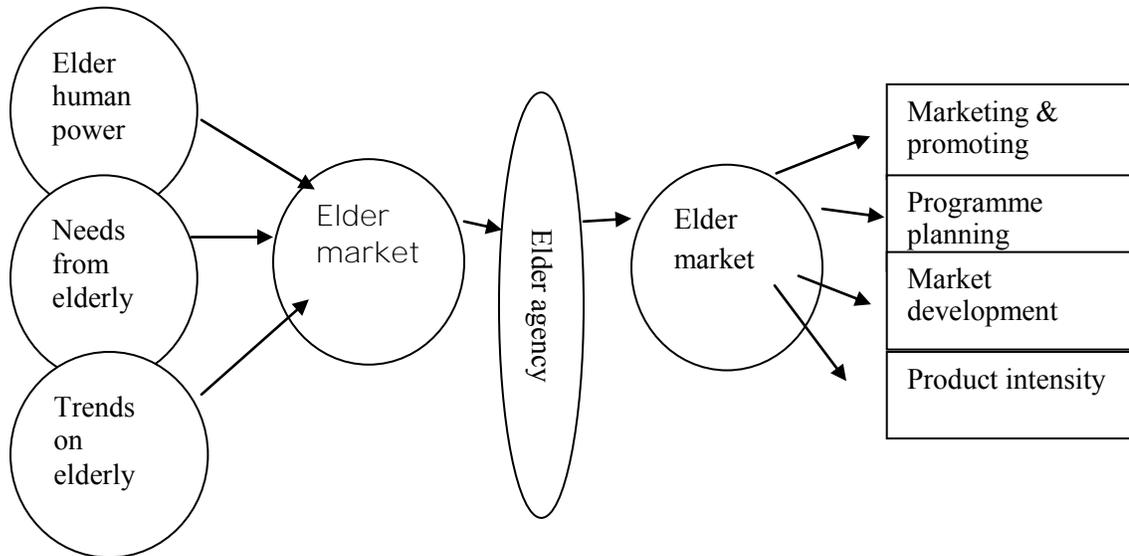
Figure 5. The Relations between an Elderly Emerging Industry and Markets

The Construction of Performance Evaluation Indicators for Professional Workers

Framework of Indicators

In accordance with the above value-system, the author further adopts the professional perspectives on adult educational organisations and applies a CIPP model (Kellaghan & Stufflebeam, 2003) (Context, Input, Process and Product) evaluation model to construct a newly-build performance evaluation model—CVIPP(Context, Vision, Input, Process and Product). This model not only fits in with adult educational organisations in Taiwan but also provides reference materials for professional workers. The fundamental structure is as follows:
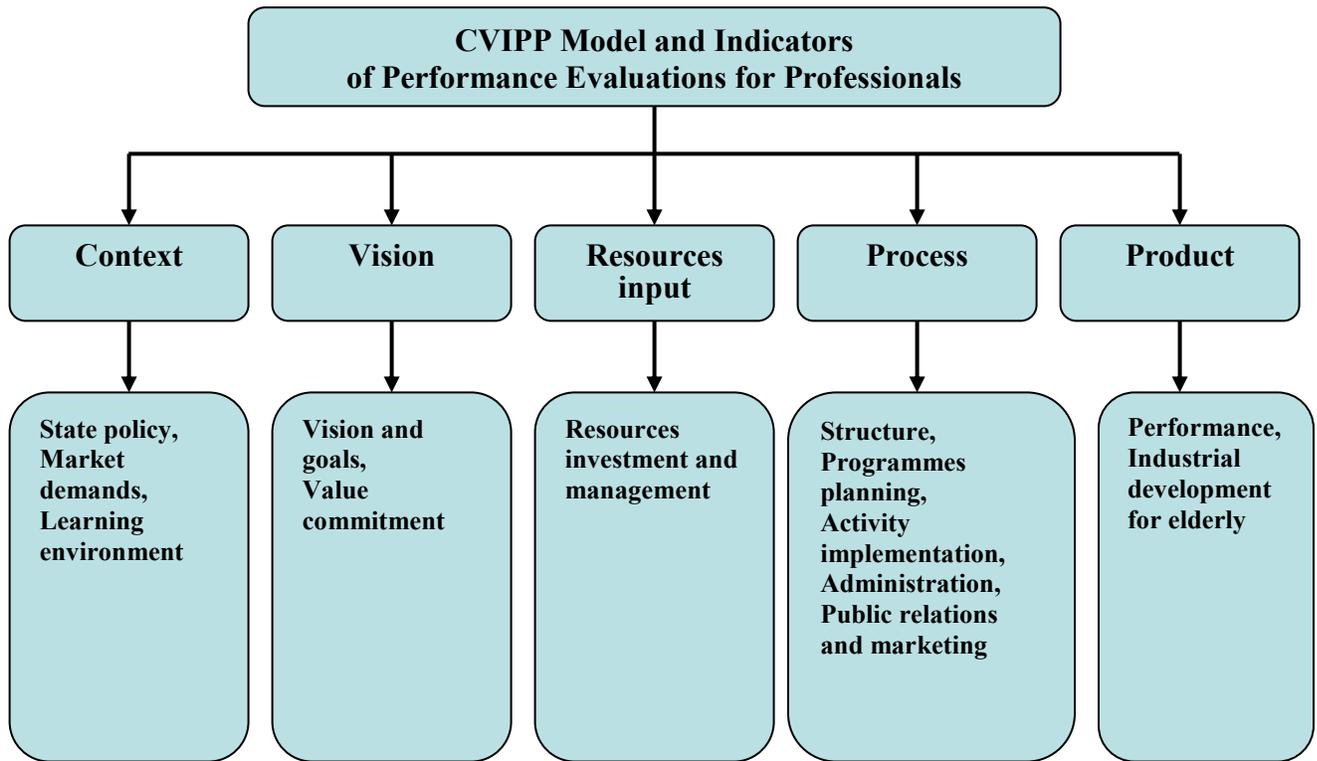
Figure 6. Performance Evaluation Indicators for Adult and Elder Education Organisations

Research Methods

This study was conducted with focus group interviews and the Delphi technique. The focus groups were used to collect ideas, upon designing performance evaluation indicators, from adult educators and professionals in the fields. As a result, 16 participants were invited to join the interviews. Using the Delphi approach 15 academics and professional workers were invited to respond to the Delphi technique questionnaire. Its purpose was to construct a list of indicators of performance evaluation.

The Design of CVIPP Performance Evaluation Indicators

The first draft of CVIPP performance evaluation indicators is shown in Table 1.

Table 1 (continued on following page)

CVIPP Performance Evaluation Indicators for Adult and Elder Education Organisations

Aspect	Items	Performance evaluation indicators
C Context	State policy	State focuses on adult and elder education The integrity of current regulations State devotes sufficient money and human power on supporting adult and elder education organisations
	Market needs	Recognize the characteristics of learner Recognize the needs of learners
	Competition and cooperation	External competitors Cooperative organisations
	Communal resources	Available resources in community Local industries in the surrounding areas
V Vision	Lucid vision	Clear visions
	Concrete targets	Aims and responsibilities Integration between aims and visions
	Explicit role position	Role positions
	Promised values	Core values
I Input	Ladle out resources and management	Human resources Financial resources Space resources Communal resource links
P Process	Organisation structure and atmosphere	Organisation management and unity of individual sector aims Organisation chart Organisation atmosphere
	Programme planning	Programme (curriculum) planning meets the needs and characteristics of learners Evaluate the needs of learners New programme designs
	Application of activity	Creative teaching methods Selection of programmes Class teaching follows course planning
	Administrative management	Self-evaluation mechanism SOP management File Managerial styles
	Personnel management	Employee performance evaluation mechanism Employee in-service learning reward mechanism
	Financial management	Budget managerial mechanism Management and operation on budget appropriation Cost benefits Fund-raising mechanism
	Public relations and marketing	Marketing strategy design in accordance to the characteristics of learners

		Marketing strategy design in accordance to organisation missions
		Relations with mass media
P **Product**	Performance	Reach the aims and visions
		Implementation of individual plans
		Real participation of learners fit into expected numbers
		Satisfaction of employees
		Satisfaction of learners
		Contribution towards local community
		Commendation upon products and image from outside of organisations

Conclusion

The new values in ageing society are focused on elderly. Elderly are regarded as the main role in the entire value-system since some elderly are capable of learning, have plenty of time to devote him or herself, have much potential to consume rather than be dependant people or disadvantages to society. The priority of establishing a new value-system is to transform the image of elder people into a positive one and reinstate the virtues of respecting and loving the aged. Also the newly proposed framework of an ageing society is based on a new value-system which is elder people centered. In this framework, learning systems have to be well-reconstructed to converge all types of learning accessibility for elder people. Meanwhile, the entire human power system needs to be re-examined. Needed is the creation and provision of more opportunities for elderly returning to the job market and undertaking in-service training. As for social and human relationships and family ethics, re-establishment of the interrelationships among family, community and volunteers is needed. In cultural inheritance, the wisdom and splendid life experiences of elderly should be cherished and respected. Creating a new platform for passing on the traditions to younger generations is becoming crucial. Last, the emerging industries are forming a new social structure in which the needs of elderly are stressed. Human power in relation to professional workers is definitely something that cannot be ignored in the ageing society.

The completion of this study represents its uniqueness as it is the first study to focus on ageing society and professionalization which undertakes, in a systematic way, performance evaluation of professional workers in Taiwan. Based on this study it is our intention to construct a complex performance evaluation model and indicators for adult and elder education organizations. Balanced scorecard, CIPP model and other performance evaluation indicators are used in this study. The types of contributions will focus not only on providing performance evaluation indicators academically, but will also raise the managerial performance and quality service among adult and elder education organizations. By the end, the aims of professionalization both for organisations and professional workers hopefully will be reached. To some extent, the system would be able to educate more professional workers which would lead to a certification system.

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Keywords: ageing society, value reconstruction, performance evaluation, CVIPP model, adult education professionalisation)

KOREAN LIFELONG EDUCATION RESEARCH: A CONTENT AND AUTHORSHIP ANALYSIS

Jihyun Kim[1]

ABSTRACT*:* The concept of lifelong education has received continuous attention from educators and policy makers since its emergence in 1972. However, the concept is so general that it is still ambiguously defined among scholars and used differently in diverse contexts. In order to map the areas of lifelong education, this paper provides a content analysis of *the Korean Journal of Lifelong Education* in terms of authorship (single/multiple and the countries of final degree obtained), methodology (qualitative, quantitative, and theoretical approaches), and research topics. Research topics are inductively coded and analyzed. The results suggest that (a) a more articulated research topic framework of lifelong education is required; (b) more in-depth knowledge about methodology is needed in Korean lifelong education research and; (c) the outcomes need to be compared with journals from other countries and other academic fields.

Introduction

Since UNESCO (Faure et al., 1972) introduced and defined *lifelong education* as ―the master concept for educational policies in the years to come for both developed and developing countries‖ (p. 182), educators and policy makers have paid increasing attention to this new approach to education. This novel term was employed and restated as *recurrent education* by OECD in 1973 and further developed in the report *Learning: The treasure within* (Delors et al., 1996). Moreover, the European Council established 1996 as the European Year of Lifelong Learning. Lifelong education was also employed and institutionalized by many developing countries including Japan and South Korea (Dighe, 1999; Maehira, 1994). For example, the Korean government enacted a law to facilitate lifelong education for all people in 1982 and further enacted a law that defined local governments‗ role and duty in lifelong education.

Although the lifelong education framework is widely employed by policy makers, the concept is still defined ambiguously in academia, and the boundary of the discipline is not clear enough among scholars from different countries. For instance, in some contexts, *lifelong education* is used interchangeably with *adult education*, whereas adult education is regarded as a part of lifelong education or distinguished from lifelong education. Therefore, this paper aims to examine recent trends in lifelong education research by reviewing the *Korean Journal of Lifelong Education*. Korea is one of the leading countries of lifelong education in terms of both research and policy, and the journal is a major journal of lifelong education research in Korea. The purpose of this study is to review (a) who is involved in lifelong education discourse in Korea? (b) identify which research methods are used in Korean lifelong education research, and (c) understand what is discussed in Korean lifelong education discourse? The results can provide a map of lifelong education research in Korea and insight into further development of lifelong education research.

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Research Methods

To understand the characteristics of Korean lifelong education research, this study reviewed the *Korean Journal of Lifelong Education*, which is the most influential journal in the lifelong education field in Korea. The journal was created in 1995 and originally published biannually. But it has been published quarterly since 2005. In this study, journal articles published in the last five years, from 2005 (Vol. 11, issue 1) to 2010 (Vol. 16, issue 2), are analyzed. The total number of articles published in this period was 178. The journal analyses focused on three aspects: authorship, research methods, and areas of research topics. Authorship is analyzed based on number (single, multiple), and the geographic region of the authors' final degree institution (Korea, North America, and Europe). Gender analysis was not conducted because the gender information was not provided by the journal and Korean names do not clearly reflect gender information. The research methods are divided into three categories: quantitative, qualitative, and theoretical approaches.

Unlike the other two aspects, the topic area is inductively coded. The researcher initially attempted to use Kulich's (1996) adult education research topic categories and Kwak and Choi's (2005) framework with ten Korean lifelong education topic areas. However, none of these frameworks resulted in a meaningful outcome regarding research topic trends. Kulich's framework was based on the Western adult education tradition, which does not include some lifelong education topics such as lifelong learning city policy. Also, Kwak and Choi's framework that consists of ten categories of lifelong education research— such as lifelong learners, lifelong educators, lifelong education program, lifelong education policy and system, and lifelong education theory and concepts— does not exclusively define the topic areas; as a result, many articles are put into more than two categories. For example, a study dealing with women's online education program participation was categorized in both the lifelong learner area and the lifelong education program area. This framework did not inform about the recent trend either. Using the same example, the study would be labeled as lifelong education program according to this framework; but, it tells nothing about the online issue.

For these reasons, the researcher decided to use keywords to analyze the journal contents. Instead of reviewing keywords provided by authors, up to three keywords from each article were drawn by the researcher because authors' keywords were sometimes too general (e.g., lifelong education) and too specific (e.g., Choengwon Educational and Cultural Solidarity). Keywords were generated regarding three aspects: who, where, and what. Then, topics were coded based on common themes. The codes are shown below.

> 100 who: unit of analysis
> 　　110: lifelong educators
> 　　120: lifelong learners (121-women, 122-old adults, 123-young adults,
> 　　　　124-non-traditional students, community residences, 125-workers)
> 　　130: lifelong education programs　　140: lifelong education institutes
> 　　150: lifelong education policy　　160: philosophy and theory
> 200 where: contexts/locations of lifelong education

210: community   220: lifelong education institutes
230: higher education (231: 4 or 2year college, 232: online HE)
240: workplaces
300 what: subject of analysis
     310: learning theory   320: participation
     330: social capital & social network   340: community development
     350: literacy   360: satisfaction
     370: needs assessment   380: career development

Findings and Discussion

This section shows the results from the analysis. The total number of articles from 2005 (volume 11 issue 1) to 2010 (volume 16 issue 2) is 178. The average number of articles in each issue is 8.1, ranging 5 to 15. Table 1 shows the number of articles by year.

Table 1

Number of Articles by Year.

Year	2005	2006	2007	2008	2009	2010[*]	Total
Frequency	30	34	31	29	40	14	178
Percent (%)	16.9	19.1	17.4	16.3	22.5	7.9	100

      * This is a partial year

In terms of authorship, almost 65% articles were written by a single author, a quarter of the articles were authored by two researchers, and around one out of ten articles was written by more than three authors. This result is similar to *Adult Education Quarterly* content analysis of all submissions from 1989 to 1999 (Taylor, 2001). According to Taylor, 67.3% of the articles were single authored while 32.7% were multiple authored. However, it is risky to compare two results directly without considering the fact that Taylor's study includes articles from 1989 to 1999 whereas this study is based on articles from 2005 to 2010.

Table 2

Number of Authors per Article

# of Authors per article	1	2	3	4	6	Total
Frequency	114	45	14	4	1	178
Percent (%)	64.0	25.3	7.9	2.2	.6	100

The total number of first authors without counting duplicates is 109 from 178 articles. Four scholars wrote six papers as first authors, one scholar did five articles, and 38 authors wrote two to four articles. Authors who wrote only one article as a first author were 66.

As can be seen in Table 3, about two thirds of authors completed his or her final degree in Korea and the other one third of authors pursued their final degrees outside Korea. Among those foreign countries, the United States of America is the majority country (26.4%). No annual trend is found. All authors are Korean.

Table 3

Educational Background of Authors

Education (Final Degree)	1st Author #	(%)	2nd Author #	(%)	3rd Author #	(%)	4th Author #	(%)	Total #	(%)
Korea	116	65.2	39	21.9	15	8.4	3	1.7	173	66.3
USA	46	25.8	20	11.2	2	1.1	1	.6	69	26.4
Japan	5	2.8	-		1	.6	-		6	2.3
German	7	3.9	3	1.7	1	.6	-		11	4.2
England	3	1.7	-		-		-		3	1.1
Canada	1	.6	2	1.1	-	10.7	-		3	1.1
Total	178	100.0	64	36.0	15	8.4	4	2.2	261	100

Table 4 shows what research methods are used in lifelong education research. As can be seen, more conceptual approaches were conducted in the field, and more qualitative methods were employed than quantitative methods. As Figure 1 shows, the number of conceptual or theoretical papers has been reduced and more empirical studies using either qualitative methods or quantitative methods have been increasing for the last five years. No study identified the methods as mixed methods; however, many studies used both qualitative method and quantitative method to collect data. For example, while studying relationships between _returnees from military service' and college culture, Nah and Kwon (2010) used both national survey data and in-depth interviews with those returnees. However, the authors identified their study as qualitative research.

Table 4

Research Methods in Lifelong Education Research

Methodology	Quantitative	Qualitative	Theoretical	Total
Frequency	46	57	75	178
Percent (%)	25.8	32	42.1	100
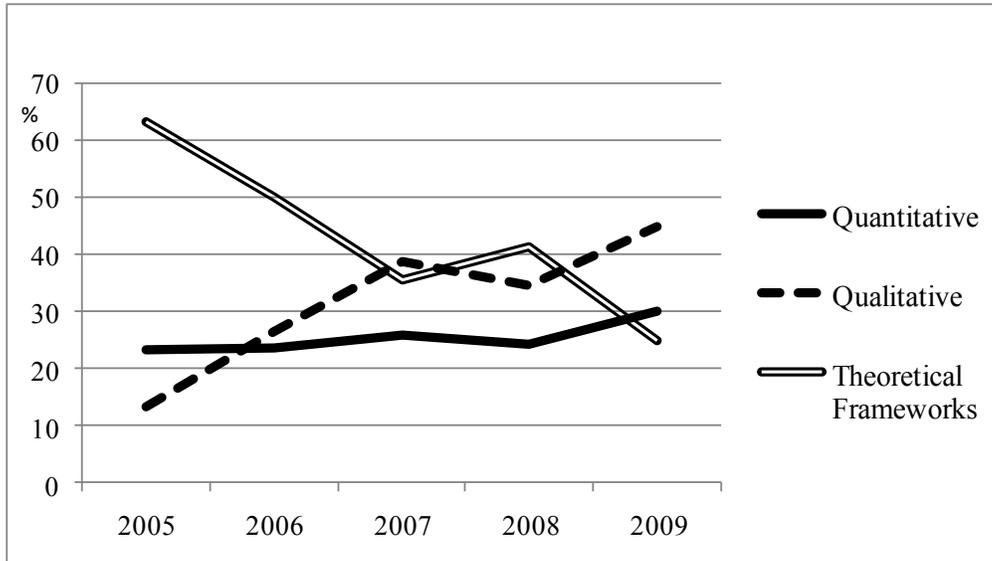
Figure 1. Annual Trend of Research Methods

In terms of research topics, three levels of analysis were conducted. First, regarding the unit of analysis, around half of the studies were about lifelong learners including adolescents and adults. To be specific, from 67 studies dealing with the lifelong learner topic, lifelong learners were discussed in terms of women (22.4%), old adults (10.5%), college students (10.5%), workers (10.5%) and non-traditional college students (7.5%). Policy issues reflected Korean contexts: Lifelong Learning City projects (LLCP) and Education Safety Net projects (ESN). The LLCP is a project to build local community as a learning city and ESN is to support K-12 students from low-income families.
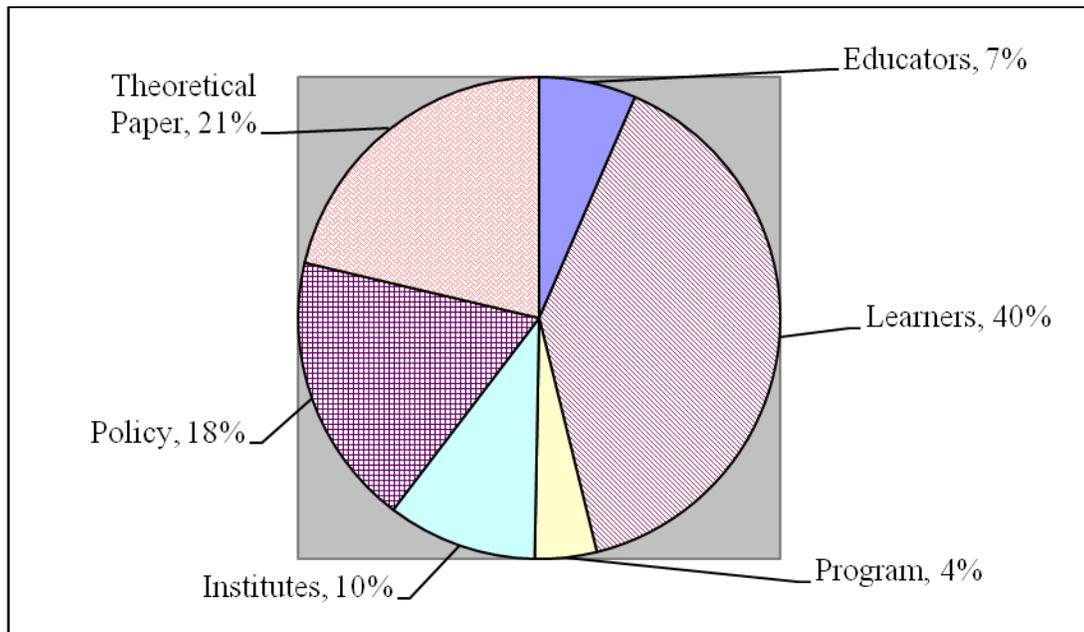
Figure 2. Topic 1: The Unit of Analysis

As can be seen in Figure 3, lifelong education was more discussed in the community context. This observation can be understood in relation to LLCP, because LLCP is initiated by local governments and the project is based on local communities. In higher education contexts, half of the research was about online higher education: participation, obstacles and supports, and learning possibilities. The other half was about college students' lifelong learning in 2 or 4 year universities. Learning centers refer to continuing education centers in universities and local lifelong education centers in communities.
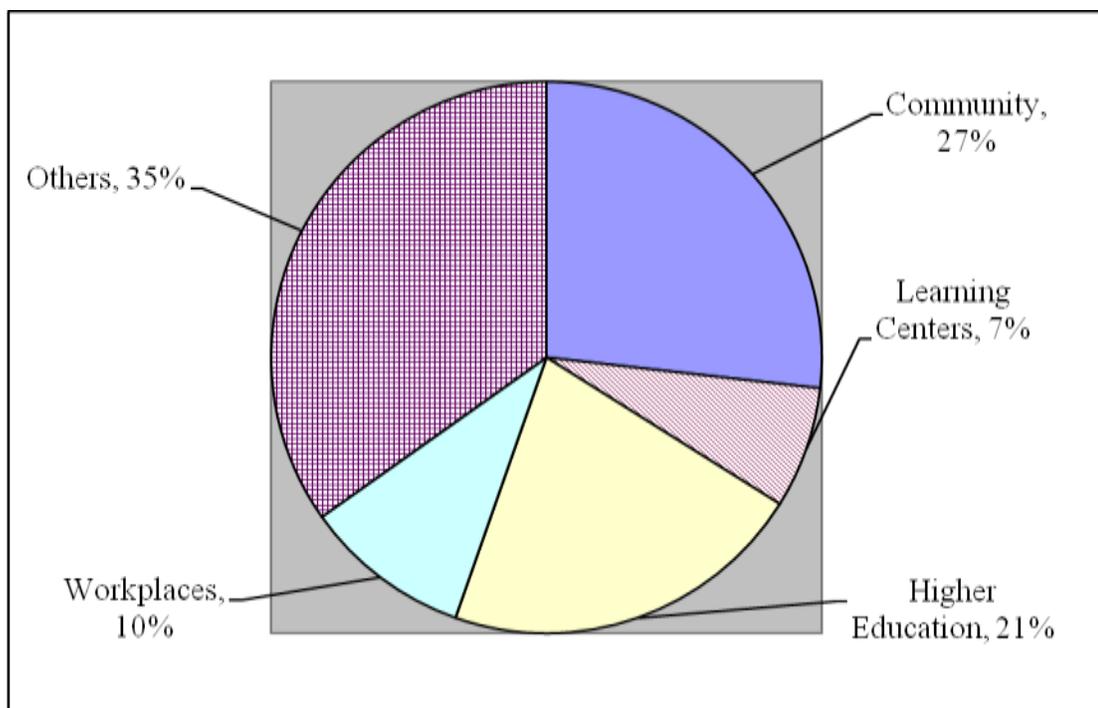

Figure 3. Topic 2: Contexts of Lifelong Education Research

Figure 4 shows what aspects of lifelong learners are discussed in the journal. The topics are diverse, but many learning theories including experiential learning, non-formal learning, and self-directed learning theories are found. Interestingly enough, many Korean lifelong education scholars delved into social capital and social network issues to understand policy and community development, which is seldom found in the *Adult Education Quarterly*. This result would be supported by an argument that Asians tend to focus on relationships while Western people tend to focus on individuals (Marsella, De Vos, & Hsu, 1985). In contrast, no transformative learning theory is found in the Korean journal which is paid continuous attention from adult educators in the US particularly.
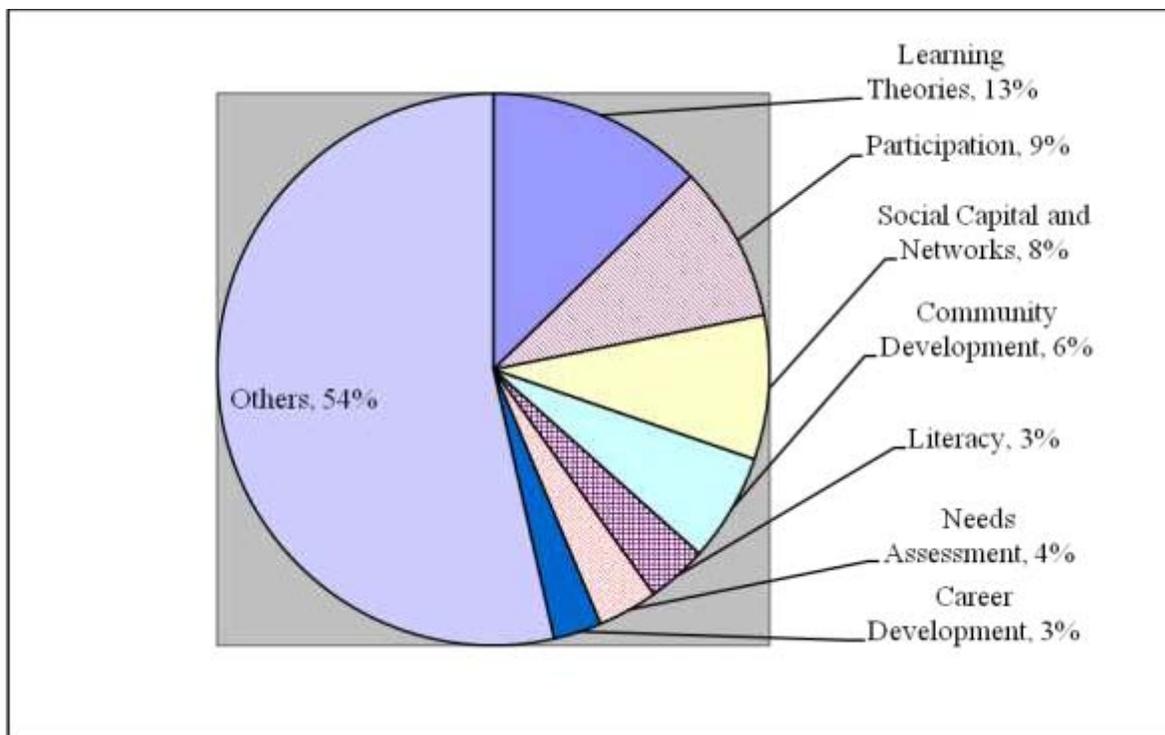
Figure 4. Topic 3: Subjects of Lifelong Education Research

Conclusion

In conclusion, the paper provided a content analysis of the *Korean Journal of Lifelong Education* in terms of authorship, research methodology, and research topic area. Two thirds of Korean lifelong education scholars are trained in Korea and most of the others obtained their final degrees in the US. Recently, empirical studies increased while theoretical papers decreased. Finally, from an inductive topic analysis, women, old adults, and those who have been less regarded as traditional learners are paid increasing attention in lifelong education research and community tends to be highlighted as a learning site in addition to higher education institutes. Also, traditional lifelong education topics such as participation, needs assessment, and literacy are getting continuous attention in the Korean lifelong education field.

From the analysis, three suggestions are drawn: (a) a new and more articulated research topic framework of lifelong education is required for further comparison of lifelong education research; (b) more in-depth and critical knowledge about research methodology is needed in Korean lifelong education research; (c) in order to yield more meaningful results, the outcomes need to be compared with other journals published in other countries and other academic fields. Then, you can draw a more accurate and larger map of lifelong education research in the 21century.

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FACTORS THAT PROMOTE TRANSFORMATIVE LEARNING EXPERIENCES AMONG INTERNATIONAL ADULT LEARNERS FROM SUB-SAHARAN AFRICA

Alex Kumi-Yeboah[1]

ABSTRACT: International adult learners from Sub-Saharan Africa pass through different phases of learning experiences as part of their journey to achieve academic success. Research has investigated factors that promote transformative learning experiences of international adult learners from Sub-Saharan Africa in an American university. The paper will address questions such as transformative learning, pre-arrival transformative learning, and factors that promote transformative learning of international adult learners from Sub-Saharan Africa.

Why International Adult Learners from Sub-Saharan Africa Choose to Study in the U.S.

The people of the African continent have been through different stages of exploitation, colonial domination, and years of political, economic, social and cultural transformations. It is the second largest continent in the world with vast natural resources and plays a leading role in the world's development. It struggles in the areas of education, health, infrastructure, and economic developments. These factors have resulted in numerous challenges such as political instability, lack of infrastructural facilities, and lack of educational resources. Inadequate infrastructural facilities and the lack of other educational resources present problems in dealing with the increasing population. These conditions have made the United States a desirable destination for adult learners from Sub-Saharan Africa to pursue higher education with the goals of having access to the available educational resources like technological resources, financial assistance in terms of scholarships, ease in transportation, and communication.

Background

Transformative learning is the process whereby adult learners critically examine their beliefs, assumptions, and values in light of acquiring new knowledge and begin a process of personal and social change called reframing in perspective (Mezirow, 1990). According to Ritz (2010), transformative learning among international students varies due to factors such as differing cultures, languages, educational background and personality traits. Transformative learning was first identified among women re-entering higher education by the chief proponent of transformative learning Mezirow (1978). He investigated the experiences of these women as rather than merely adapting to changing circumstances by more diligently applying old ways of learning and discover a need to acquire new perspectives in order to gain a more complete understanding of changing events.

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According to Mezirow (1991), perspective transformation as the process of how adult learners could revise their meaning structures. It is the act of culturally defined frames of reference that is inclusive of meaning schemes and meaning perspectives. Meaning perspectives are a general frame of reference, worldview, or personal paradigm involving ―a collection of meaning schemes‖ made up of higher-order schemata, and theories (Mezirow, 1991). Meaning perspectives operate as perceptual filters that organize the meaning of personal experiences. As the new experience is assimilated into these structures, it either reinforces the perspective or gradually stretches its boundaries depending on the degree of congruency. The transformed meaning perspective is the development of a new meaning structure that results in the individual questioning previously held values and beliefs. The concept of frame of reference consists of two dimensions: habit of mind and point of view. Habit of mind is a broad, abstract, orienting, habitual ways of thinking, feeling, and acting that is influenced by assumptions that constitute a set of cultural, political, social, educational, and economic codes (Mezirow, 1997, p. 6). It also includes dimensions of sociolinguistic, moral-ethical, epistemic, philosophical, psychological, and aesthetic perspectives that include sets of immediate specific expectations, beliefs, feelings, attitudes, and judgments (Mezirow, 2000, p. 18). The habit of mind is expressed in a particular point of view: ―the constellation of beliefs, value judgment, attitude, and feelings that shape a particular interpretation‖ (Mezirow1997, p. 6).

As adults learn new information, they determine how to make it fit into their existing belief and value structures. If the information readily fits into past patterns, they continue with an understanding of the information, but without much further disruption in their beliefs, values, and assumptions. However, if the information does not readily fit, then they begin to question their values and assumptions to determine what is out of place (King, 2009). Mezirow‘s original research explained ten phases of perspective transformation as: (a) a disorientating dilemma; (b) self-examination with feelings of guilt or shame; (c) recognition that one‘s discontent and the process of transformation are shared and that others have negotiated a similar change; (d) exploration of options for new roles, relationships, and actions; (e) a critical assessment of assumptions; (f) provisional trying of new roles; (g) planning of a course of action; (h) acquisition of knowledge and skills for implementing one‘s plans; (i) building of competence and self-confidence in new role and relationships; and (j) a reintegration into one‘s life on the basis of conditions dictated by one‘s new perspectives (Mezirow, 1978, 1994; Taylor, 1997). Adult learners may experience dramatic changes in their professional perspectives when they progress through foundational courses for their future or current profession (King, 1998). Alternatively, Tisdell (2000), King (1997), and Cranton (1994) have argued that activities such as cultures, immigration, social, and financial challenges of adult learners contribute to transformational learning. Tisdell (2003) criticized Mezriow for lack of attention to the unconscious and spirituality. King (1997) also concluded in her mixed method study that adult learners experience facilitated transformative learning, as did occurrence of other life changes such as immigration, emotional issues, changing jobs, and /or residence. According to King (2000), transformative learning could occur through the following phases: (a) Fear and Uncertainty; (b) Testing and Exploring; (c) Affirming and Connecting; and (d) New Perspectives. These phases are consistent with

the fundamental understanding of the needs of educators as adult learners (Lawler & King, 2000).

Pre-Arrival Transformative Learning Experiences Among Adult Learners from Sub-Saharan Africa

Avoseh (2001) made a number of observations about traditional African value systems and learning. Values of Africans learn more towards collective than that of the individual concept of responsibility. It comprises the following dimensions and values. The spiritual dimension means that participation is influenced by the metaphysical world where the individual is more responsible to the community and has spiritual obligations. The communal learning dimension emphasizes one's commitment to the interest of the ―corporate existence of the community." The political dimension is interpreted as the responsibilities to serve the interest of the nation before oneself through the effort of the community's family and spiritual duties. According to Fafunwa (1974), the aim of traditional African education is multilateral with the main objective is to produce an individual who is honest, respectable, skilled, cooperative and conforms to the social order of the day. In Sub-Saharan African society, there is no individual without the collective and that the collective includes human beings, the world of nature, and the world of spirits. The tools of culture (family, gender, language spirits, and status) will shape one's experience to promote transformative learning. Different languages (about 1000 recognized ethnic languages spoken in Africa), cultures, values, and beliefs in Sub-Saharan society enhance the collective nature of learning. Cultural values like collectivity appear to be the most common cultural entity of the people. One's identity is determined by the group, to which one belongs not by individual characteristics. The people of the Sub-Saharan African Region embrace connectedness, spirituality and concept of family. There is the idea that respect for the human life, self and mutual help, cooperation, love of generosity, harmony and the preservation of the sacred are important.

The educational system in Sub-Saharan Africa is based on either British or French (European) systems where the curriculum has little student participation in the classroom, critical reflection, project based learning and research projects. The educational system demands that the teacher become the center of attention (teacher-centered learning) where students depend on them for knowledge and do not have to question authority. Acquisition of knowledge is more of rote memorization. The ability to develop critical thinking is limited and students' ability to develop critical consciousness to become conscientized to intervene in their world as transformed students is minimal. ―The more students work at storing the deposit work entrusted to them, the less they develop the critical consciousness" (Freire, 1970 p. 60). This defeats the primary purpose of education that should be to develop the capacity of learners to think critically so that they are capable, as citizens, not only of grasping and expanding their understanding of life but also of wisely using the acquired knowledge and experience in the betterment of them- selves and the world in which they live.
In Sub-Saharan Africa, the adult learner receives education by way of disassociating the learner from his/her oral code of the cultural community. The adult grows not to accept or be proud of the community's history and heritage. It is however, noticeable that the

majority of the students want to learn the local knowledge and indigenous experiences but they also want to come out of their formal schooling with degrees that are ―transferrable‖ in globalized contexts. Students learn the value of spirituality in the community. It is understood that there are connections to humility, healing, the value of wholeness, self and collective empowerment, liberation and ―reclaiming the vitality of life‖ (Palmer, 1999 p. 3). Sub-Saharan adult learners enter the U.S with different cultures, such as languages, food, music preferences and modes of socialization. They may speak French, Portuguese, Arabic or English with different accent. Most of them are also multi-lingual, as they can speak English and French, or Arabic and French or English and Arabic in addition to native languages such as Hausa, Ewe, Zulu, Yoruba, Akan, Somali, Mende, Swahili, Somali and others. It is interesting to note that international students from Sub-Saharan Africa bring with them comprehensive knowledge in global affairs to the U.S. This comes from their educational background and the content of their curriculum.

Factors that Promote Transformative Learning International for Adult Learners from Sub-Saharan Africa

There are many factors that tend to promote transformative learning for international adult learners from Sub-Saharan Africa. These include: critical thinking skills, classroom discussions, discovering the voice of Black African adult learners and learner support.

Critical Thinking Skills

Transformative learning is a highly individualized experience and calls for how the individual develops critical reflection to question assumptions and examine self from the previous experience or knowledge (Cranton, 2002). Black African international students are not used to the teaching learning process in the U.S., with the use of discussions, participatory research, case studies, project based, problem solving and self-evaluation. They are used to listening to the teacher and hardly understand professors here in the U.S. because of cultural differences and lack of English language proficiency. Even if they do, the idioms they are used to are different from the American culture. Black African students are also used to the lecture method and learning by memorizing facts with little or no student participation in the classroom. Critical thinking is the process of examining assumptions that include: beliefs, values and ways of understanding (Brookfield, 1987).

It is beneficial for students to do classroom activities that will include assignments to research or critique scholarly journals in their respective academic fields to help promote critical thinking skills. This will enable them to have opportunities to do reflective thinking (cognitive, critical and narrative elements of examining issues). Critical learning occurs when the learner compares new ideas to existing knowledge and there is continuous interplay of questions and answers. This can be done through the use of questions, experiential learning, critical reflections, journaling and constructing conscious-raising experiences. These will serve as an impetus to make students challenge previously unexamined values, beliefs and assumptions.

Personal Journaling

Adult learners from Africa are used to the lecture methods of learning. They usually earn through rote memorization and hardly do class activities such as personal journaling, collaborative learning and writing. Writing daily and weekly descriptions of what happened in their lives will be a great tool to reflect on their lives in the new environment. It will serve as a tool for them to reflect and link the past from the present. Hiemstra (2001) agreed that whether journals are kept online, in a notebook, or dictated, they serve the purpose of individual learners, usually, continuing to develop and analyze their thoughts beyond dialogue. With the use of journals, which can take many forms in an adult education setting, adult learners from Africa have the opportunity to share and discuss part of their journals with teachers, which, will lead them to recognize and develop insights into their educational needs and development (King, 2005). Adult educators can use reflective questioning to serve as a guide to initiate classroom discussions or lectures.

Finding the Voice of Black African International Adult Learners

Adult learners from Sub-Saharan Africa do experience some adjustment problems upon their arrival in the U.S. Some of the challenges are financial difficulties, loneliness, homesickness, depression, confusion upon arrival, lack of English proficiency, academic, discrimination and lack of close family support in the U.S. Adjustment as a process over time seems to follow a U-shaped curve. It is felt to be easy and successful to begin with; then follows a ―crisis‖ in which one feels less well adjusted, somewhat lonely and unhappy; and finally one begins to feel better adjusted again, becoming more integrated into the foreign community (Ritz, 2010). The orientation programs in most colleges are not comprehensive enough for them to receive information before and after arrival to be able to adjust to campus environment. Black African International students are not used to the individualistic nature of life in the U.S. This situation becomes difficult for them to establish friendly relations with American students because they are used to the group or collective culture that has been used to shape their learning process to conform to the rules of the group and ideals of communal cultures. Financial problems are also not an exception to Black African international students upon arrival, during and after their education in the U.S. The majority of African students find it hard to pay for tuition, accommodation, transportation and other expenses. These challenges make them experience disorientating dilemmas and states of disequilibrium as the first stage in Mezirow‗s 10 stages of perspective transformation (Mezirow, 1990). These lead students to what Cranton (2002) calls radical changes in the life or rocky turbulence of their current situation. It also throws off balance the need to create perspectives and views for learning (King, 2009). They begin to do self-examination as to why they have lost status and are experiencing changing perspectives in their lives. These experiences allow the African students to do self-assessment in order to discover their voice. This voice becomes an expression of self-understanding, identity and acceptance. The ability of Black African international students to express their voice concerning challenges they have gone through may lead to an integration of self-evaluation and empowerment as a vital tool for transformative learning.

Classroom Discussion

International adult learners from Sub-Saharan Africa are generally passive, submissive and hardly contribute or participate in classroom discussions and must acknowledge that they are in the process of cultural shock upon arrival to the U.S. It would be significant for educators to create good physical environment and an all-inclusive classroom that can break the walls of hesitancy that many international students bring to the educational experiences (Brookfield, 1986). The classroom-learning environment should be supportive to help one's values and assumptions. With this, the learner will be able to use their critical thinking skills to question assumptions, and authority to limit power. Educators should engage African students in discussions of analysis of tasks, so that they can reflect on the meaning of the content of study. Engaging in discussions would allow African students to have opportunities to express their problem and find solutions. This could be achieved through collaborative group work, problem-based learning, online courses and project-based learning.

Conclusion

International adult learners from Sub-Saharan Africa experience transformational learning through critical thinking assignments, guided activities and discovering their voice (King, 2000). The educational implication of this paper is that, it has created awareness of the challenges students from Sub-Saharan Africa face as part of their journey in transformative learning experience. The paper highlighted the role culture plays in transformative learning of individual students or groups of students from Africa. Adult learners from Africa have the ability to reflect on past experience that enables a commitment to working with colleagues in collaboration and support. In general, transformative learning does not offer easy answers to the challenges of the adult learning classroom; it provides an opportunity of a multidimensional paradigm that will help develop the growing understanding of the new teacher who is the learner (King, 2005).

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A LEADERSHIP DEVELOPMENT PROGRAM FOR EMERGING SOCIAL INNOVATORS

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ABSTRACT: This paper describes a leadership development program, entitled ASCENT, designed to engage multicultural youth and young adults in identifying innovative ways to address social and economic needs. It features strategies for equipping multicultural participants with leadership competencies geared towards social innovation. It discusses the logic model that guided the design of the ASCENT program. The logic model explores multiculturalism in Canada, the program's assumptions, investments, activities, outputs, and outcomes. This paper extends the literature on leadership development approaches, mentoring, and social innovation. Social entrepreneurship is suggested as a potential vehicle for encouraging innovation; promoting inclusion; and reducing out-migration, which occurs whenever social and economic needs are not met.

Introduction

Canada's diversity is clearly evident in both large metropolitan areas and in small rural communities. According to Environics polls, ―82% agree that multiculturalism is a source of pride for Canadians and 83% agree that people from different racial and cultural groups are enriching the cultural life of Canada" (Focus Canada, 2002 cited in CIC, 2010, Section 1, footnote 2). Canadians celebrate multiculturalism but like any other nation, there are social challenges that vary by context. Some of the key social challenges in the world today include diversity, climate change, sustainability, the widening gap between rich and poor, and the social and economic impacts of globalization, among others (Goldenberg, Kamoji, Orton, & Williamson, 2009). These factors impact people's lives directly and indirectly. Faced with these and other challenges, various observers point out that people immigrate seeking to ‗escape' whatever reality it is that they are confronted with or in search of ‗better' livelihoods. However, even in a developed country such as Canada, both immigrants and locals (citizens) face unique challenges that demand innovative solutions. Rural communities in Canada face the challenge of not only attracting but also retaining and engaging new immigrants. Consequently, ―Social innovation is now embraced around the world as legitimate public policy in both the economic and social arenas." (Goldenberg et al., 2009, p. vi). Social innovation is defined here as *"the development and application of new or improved activities, initiatives, services, processes, or products designed to address social and economic challenges faced by individuals and communities"* (Goldenberg, 2004, p.1).

The ASCENT program described in this article, seeks to engage and develop emerging leaders as social innovators. The program was designed to equip participants (youth and young adults) with leadership competencies (attitudes, skills, knowledge, and abilities) that enable them to be social innovators (agents of social change). Social innovation is the core of this leadership development program.

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Social innovations aim to address the social challenges through innovative means, whose scope can be small and localized or of global scale, such as climate change (Goldenberg et al., 2009). Diverse players work on alleviating social problems, including non-profit/non-governmental organizations (NPOs/NGOs), government agencies, some businesses, and citizen organizations. Another social innovation approach/movement that is gaining ground internationally is what are termed ‗social-enterprises or businesses or ventures,' whose mission is to generate revenues to meet social needs. Yunus argues that social entrepreneurs' motivation is to engage in revenue-generating activities that are used to do good to people and to make a difference in the world (Yunus, 2007).

The ASCENT program's leadership model is shaped by, among other factors, the ideas of Dr. Mohammad Yunus, the Nobel Peace Prize winner and the pioneer of the social businesses (social entrepreneurship) movement, which emphasizes the need to give people the power to help themselves (Yunus, 2007). Multicultural youth in particular face unique challenges as the ‗new' and ‗home' cultures converge. Rather than being told what they must do, this program is about equipping them to identify potential solutions that would enhance their experiences and communities. Equipped with the leadership essentials, the participants (emerging leaders) would initiate and eventually lead social enterprises, a form of social innovation.

This program was designed based on the premise that leadership is a learned process and that leadership should be about empowering regular people to engage their talents in socially responsible practices (Nafukho, Wawire, & Lam, 2010). Hughes, Welsh, & Bolay (2009), note: "Leadership is ultimately about social change, and...effective leaders are those who are able to effect positive change on behalf of others and society" (p. 9). Figure 1 illustrates these relationships between social needs (situation), the program activities, and the outcomes that eventually would meet these needs (indicated by the feedback loops). The focus of the leadership development program was targeted towards social innovations that would enhance not only individual integration needs but also the community's development. It seeks to provide an avenue for capturing and developing fresh innovative ideas that could benefit them and the community at large.

Social Innovation and Social Entrepreneurship

Social innovations in Canada have been on the increase. According to Goldenberg et al. (2009) "The growth of social innovation, both in Canada and internationally, has been significant over the last few years, during which time there has been considerable evolution in the concept and a widening of its application...". However, ̶despite Canada's long and proud history of social innovation, our nation seems to have fallen behind while others are progressing. In particular, Canada has not adopted broader models that promote greater public support, funding, and encouragement of social innovation as other countries have begun to do. Yet how we move forward to embrace and foster social innovation will be critical for future generations of Canadians" (p. iv).

New immigrants come to Canada with lots of skills and experiences but still many are unable to find meaningful employment, ending up unemployed or underemployed. Even

among second-generation youth, it is commonplace for them to experience exclusion (CIC, 2010). The integration of social entrepreneurship into the leadership development curriculum is designed to not only meet the personal need for employment among skilled labour (but often unemployed/underemployed new immigrants) but also to have a positive impact on their new home communities (in Canada) that would benefit from any emergent social innovations. The potential for innovation is unlimited given the diverse talent that accompanies Canada's multiculturalism. One of the key advantages of diversity is innovation, which is characteristic of diverse communities. This program recognizes that multicultural youth and young adults are untapped talent (assets) with creative minds that would make valuable contributions. The solutions to these challenges demand the integration of ideas from both local citizens and new immigrants and leadership to bring innovative ideas to reality.

The program, named ASCENT is the acronym for *Agents of Social Change Entrepreneurs*. An entrepreneur is defined as a person who undertakes an initiative or a project ―especially one that is important or difficult or that requires boldness or energy" (Dictionary.com, n.d.). The term ―enterprise" is usually associated with business or corporations but readers should note that the primary purpose of this program is not to simply teach business skills but to introduce the participants to ways in which they could use business ideas to generate revenues, which they could use to finance their social innovations. Social enterprises use business-oriented approaches to further their social agenda. Social entrepreneurship is one of the vehicles for social innovation and community development.

ASCENT Program Logic Model

Logic models, also called theories or models of change serve as a road map and are useful for both large and small programs and processes (Wisconsin, 2008). Their graphical illustrations enable people to see the relationship between and among elements. A logic model ―provides a common approach for integrating planning, implementation, evaluation, and reporting" (Wisconsin, 2008, p. 10). This paper focuses on the program's planning and design processes, featuring the program's logic model. This is deemed important because ―failure to plan adequately leads to inefficient use of resources, poor results, and could ultimately result in... failure" (Nafukho, Wawire, & Lam, 2010, p. 137).

A logic model that was developed to guide this program utilizes a systems approach to highlight the program's inputs, processes, and outputs, as illustrated in Figure 1. A logic model shows what the program will do and achieve. It shows key components for planning, design, implementation, monitoring, and evaluation.
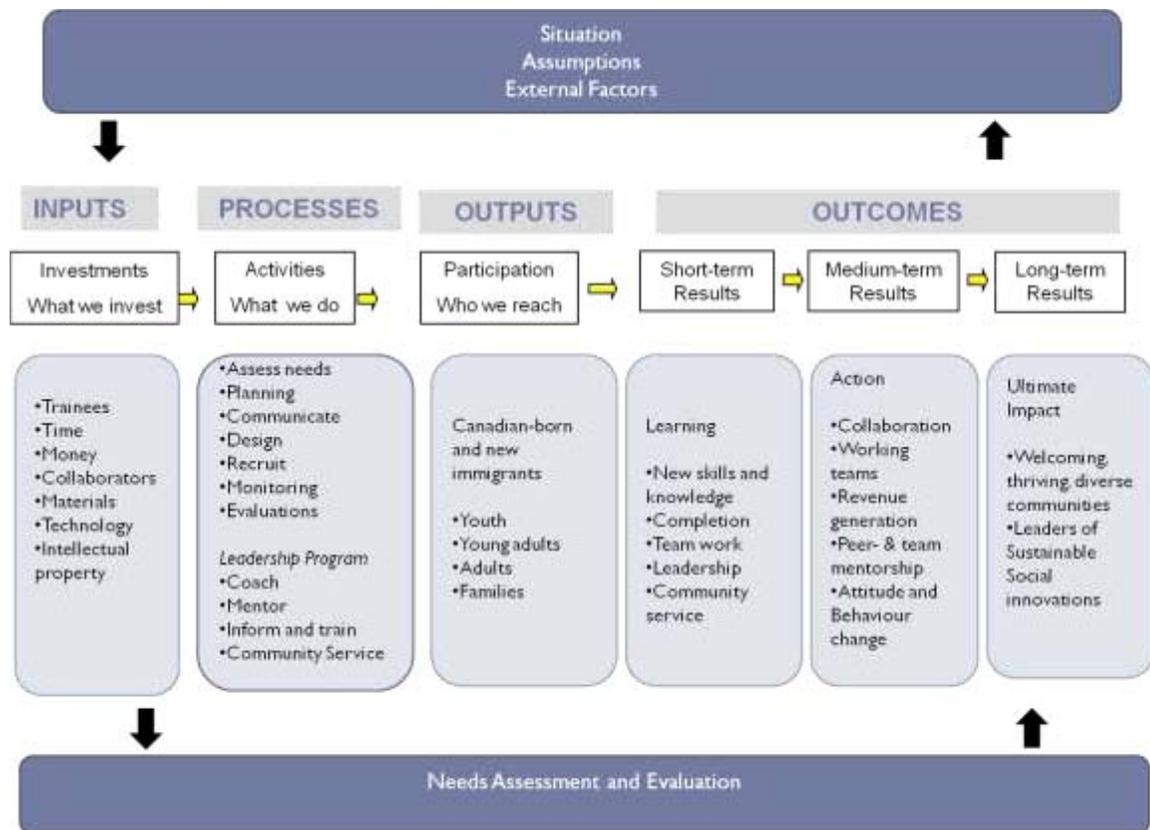
Figure *1*. The ASCENT Logic Model (Lam, 2009)

To better understand the need for leadership for social innovation, first an examination of the situation is warranted: the realities of multicultural communities in Canada (the situation).

Situation: Understanding Canada's Multicultural Population's Needs

The *situation* is central to planning any program as depicted on the logic model in Figure 1. The issue of immigration in Canada (*situation*) is examined first. Canada's diversity is regarded as one of her key assets and support for multiculturalism continues to grow. According to *Focus Canada* polls, ―74% of Canadians think that multiculturalism is a cornerstone of Canadian culture" (CIC, 2010) (CIC, 2010, Section 1, footnote 2). However, while multiculturalism seems to be celebrated and immigrants welcome, the realities of new immigrants and visible minorities deserve some mention, though briefly. *Social exclusion* is often cited as a challenge facing new immigrants. According to the CIC, women and youth/second generation are particularly vulnerable to exclusion – hence several reports have recommended devoting research themes to these two groups.

Multiculturalism in rural areas

Related to the social exclusion challenge, the need for research that examines multiculturalism issues beyond big cities is warranted, because ―there are many immigrants outside these metropolitan areas, and several provinces are committed to

increasing the flow of immigrants to smaller cities, towns and rural areas. More research is needed to see what enables smaller communities to attract and retain immigrants, and what role multiculturalism can play in building ―welcoming" communities" (CIC, 2010, Section 2, para.4). The paper is a means towards furthering this research beyond the metropolitan areas.

Knowledge transfer

One of the recommendations in a report by the Canadian Policy Research Networks (CPRN) is the need for *knowledge transfer*. **"**Knowledge transfer strategies and their adoption by social innovators need to be profiled and shared. This would help build capacity for social innovation" (Goldenberg et al., 2009, p. vi). While this program is currently being piloted, the author's goal is to engage in this knowledge transfer as the program evolves.

Youth engagement

In leading social innovations youth enggement is somewhat limited. In Canada, we are only scratching the surface of the ways in which youth can be involved in social enterprise" (Harji, Osseni, & Perrin, 2008, para. 5). Rural settings by design present limited opportunities for youth to get engaged and network with others, compared to urban areas-- rendering them a ‗high risk' population. The program was developed to address this growing need for social innovations and to integrate multicultural youth as part of the solution.

Economic performance

The challenge of new immigrants' economic performance is particularly of concern. ―All the regional reports discuss the growing evidence that the economic performance of recent immigrants is declining. Compared to earlier cohorts, immigrants today are taking longer to catch up to native-born Canadians in their earnings, and are at higher risk of poverty" (CIC, 2010, Section 1, para. 5). The integration of social entrepreneurship in the program is a potential revenue generation avenue to meet social needs such as economic empowerment.

Racism and discrimination

Last but not the least of the challenges is racism and discrimination issues. According to CIC, ―The issues of racism and discrimination were raised in all the regional reports and clearly are a profound challenge." This report goes on to report that ―While immigrants are facing increasing barriers in using their human capital – at a high cost both to themselves and to Canadian society in general – Canada is not becoming a society that is polarized between a wealthy, educated white majority and impoverished, unskilled racialized minorities, as in France and the Netherlands" (CIC, 2010, Section 1, para. 5).

It is worth noting that regardless of these challenges, Canada is celebrated as a very welcoming country that truly celebrates diversity. In light of these unique challenges, the author recognized a need, initiated and obtained buy-in from the collaborators in support of the program as a way of celebrating the richness in diversity and talent that exists, and directing these assets towards addressing the needs mentioned above. The author was the consultant involved in the planning: initiating collaborations, proposal writing, research, and coaching support. This collaborative approach will be discussed in more depth later.

This section set the background as to the urgency and critical need for social innovation and entrepreneurial approaches that could be used to address these challenges. In designing the ASCENT program several assumptions related to this situation were made.

Assumptions

Some assumptions were made earlier on in the design of this program; for example, there would be collaboration of various partners in government, business, and non-profits so that we would be able to acquire ample resources (cash and in-kind) to support the program, that the program participants would engage and the community would support related emerging initiatives. It was also assumed that the collaborators would engage not only in the pilot-funded project, but also in ensuring the sustainability of this program in the long term.

The assumption is made that innovations are about change. ―Innovation itself is evolving...and social innovation offers hope in addressing these challenges and has the potential to have a large-scale transformative effect that could improve all our lives" (Goldenberg et al., 2009, p. iii). Change is a constant and whatever initiatives are relevant today may not be in a decade's time. Flexibility to adapt is assumed.

It is also assumed that this kind of program has usefulness in other areas. Although rural communities in Canada were the context for this program and article, the concepts and program ideas could be adapted for any other context. As the program is implemented, these assumptions will be subject to evaluation over time.

External Factors

Some of the external factors influencing this program include: immigration policies that would affect the inflow of immigrants into these rural communities. Also, globalization and immigration trends are key factors as people look into other parts of the world beyond Canada as options to immigrate to. Technology is a key factor that does and will continue to affect the program implementation. In addition, local political and socio-economic factors, cultural issues, and changes within the collaborating organizations, among other factors were recognized as influential.

Investments

The logic model as illustrated shows the investments, which include:

- **Trainees**. The target group for the program were multicultural young adults and youth participants (ages 16 to 29), residents of a rural community. Their role in the program is to function as learners, peer mentors (to their new peer community members), and as mentees (being mentored by local adults).

- **Time**. All the collaborators invested a lot of time before and during the initial exploration of this program, planning, and delivery. Time invested was considered a key in-kind investment when seeking funding. Time will continue to be a key investment as the program is implemented over time.

- **Money.** The program was built on a funded and social enterprise model. The funded model sought funding from various agencies. The funders included both cash and in-kind contributions from the collaborators.

- **Collaborators**. This program utilized a collaborative approach that integrated a social enterprise, two non-profit organizations (local and provincial) both serving the multicultural population, an international charity (whose local chapter provided funding for scholarships); a provincial government (funding agency); and a university. The human resource included staff and volunteers in the collaborating organizations. Collaboration is a key feature of social innovation and ―different models for social innovation are beginning to emerge. They reflect a variety of strategies for collaboration and working with others, and for tapping into different kinds and sources of financial and other resources" (Goldenberg, Kamoji, Orton, & Williamson, 2009, p. v, para. 6). The collaborators signed a memorandum of understanding guiding the acquisition and use of funds and the roles each one would play.

- **Materials.** This included the funding materials such as proposals for funding, action plans, and learning materials. The collaborators signed confidentiality agreements as a means to protect the use of program-related materials. An overview of the content of the training and mentoring program is discussed in the next section under ‗leadership development approaches‘.

- **Technology**. Technologies played a key role in connecting the program collaborators who were geographically separated. Tele- and video-conferencing helped facilitate the processes. The program delivery approaches included face-to-face and technologically-mediated options.

- **Intellectual property**. Intellectual property is a key component and investment of any learning/training programs hence the need to protect such intellectual property. The copyright associated with the program idea and design is the author‘s intellectual property, therefore the collaborators signed a memorandum of understanding.

Activities

The logic model is a tool for highlighting the program activities, indicating what the program entails. The activities highlight both what the program collaborators and participants (youth) will do. It includes planning and communication, both of which are not static phases but radiate throughout the course of a program. Planning involved getting the stakeholders‘ buy-in and all aspects of the program such as assessing needs,

recruitment of collaborators and participants, training workshops, coaching and mentoring, monitoring and evaluation, and community service. These activities started in 2009 and are on-going processes.

Program Participants

Participation in the logic model is about ―who we reach‖ as a program. The training and mentoring program‗s direct target group is youth/young adults (ages 16-29), made up of both new immigrants and locals (Canadian-born citizens). Other participants play various roles as mentors, interns, volunteers, and collaborators. Unlike other programs that specifically focus on just one group, for example, new immigrants, it was considered important that we acknowledge the assets of all community members, regardless of their tenure in the community. The purpose of the program was to initiate activities that would get the two ‗groups‗ mixing and collaborating. However, it is assumed that the benefits would flow to their families and community.

Leadership Development Approaches

Leadership development approaches vary by context, organization, participants, topics, instructional approaches, and duration, among other variables. It was important to design a program that is tailored to the unique needs of this population – young, multicultural participants living in a rural community that is increasingly becoming diverse. The intent of the leadership development program is to equip participants with appropriate attitude, skills, knowledge, and abilities essential for:
- mentoring new peers (to integrate them into the community) and
- mentoring youth-led teams that would initiate and operate social enterprises

The leadership development approaches targets individual and team development through training, mentoring (cross-cultural peer- and team mentoring), coaching support, and service learning/community service. These development strategies are discussed next.

Mentoring. Mentoring is a longstanding practice in the development of youth and young adults, that has been described as a viable vehicle for personal growth, career exploration, and civic engagement (Grossman, n.d.), among other benefits. Additional benefits of mentoring include social, emotional, and cognitive development (Hughes, et al., 2009). The field now has definitive evidence of the positive benefits mentoring can produce for the youth being served by these [mentoring] programs" (Johnson, 1998, p. 21). Mentoring is also seen as a cost-effective strategy for immigrants to overcome employment barriers due to limited professional networks, hidden job market characteristic in the Canadian work place (Maytree, 2010). The integrated forms of mentoring are discussed next.

Cross-cultural mentoring. ―The need for cross-cultural mentoring is accelerating with the emergence of an expanding global and diverse workforce. Cross-cultural mentoring, whether it is conducted in a one-on-one, group, or distance format, presents a significant opportunity to leverage diversity and build a more inclusive, globally functional, and

productive organization" (Zachary, 2005, p. 207). For the ASCENT program, cross-cultural mentoring is a strategy for developing diverse, innovative, and welcoming communities.

Mentoring initiatives are also a key to understanding cultures and engaging in one-on-one or team/group mentored relationships as a means of raising social awareness that is deemed essential in challenging negative assumptions about new immigrants. "The impact of culture is omnipresent; it has both a conscious and an unconscious influence on human behaviour" (Zachary, 2005, p. 15). Our cultural assumptions influence our thought patterns and assumptions; our communication patterns; behaviours, and our attitudes towards about decision making, time use, punctuality, social patterns and protocols (Zachary, 2005). The mentoring and the training as a whole engage participants on a journey of self-discovery that may help with integration and innovation.

Mentoring programs are designed to improve specific problems or to reach specific goals, for example integration into the community. The term "integration" has different dimensions and this program considers "social integration into the networks and spaces of civil society, from informal networks of friends and neighbours to membership in more formal organizations" (CIC, 2010, Section 2, para. 3). The goal of the mentoring initiative is to provide both new multicultural youth (immigrants) and local youth opportunities to engage in activities that would develop their leadership competencies and engage them positively within the community.

Cross-cultural mentoring involves both individual and cultural diversity and "focuses specifically on differences in behaviours, values and customs unique to a particular geographic area or country" (Zachary, 2005, p. 207). Program participants represent a diverse mix of nationalities and cultures but rather than focus on differences, the program will also emphasise similarities shared as a means for matching mentoring partners--Canadian-born youth mentoring a peer newcomer. This is a form of peer mentorship.

Peer mentoring. This usually occurs between two people who consider themselves as peers. The definition of 'peer' differs depending on what it is that the two people engaging in mentoring have in common. Peers usually have shared interests, expertise, experiences, age group, students in the same school, educational level, etc. Peer mentoring holds promise for increasing organizational knowledge creation and sharing (Bryant, 2005). Sharing knowledge, both within or outside formal organizations, is critical especially to new immigrant youth and young adults who have limited professional and personal networks in Canada.

Team mentoring. Another piece of the mentorship initiative is with members of the local Rotary club (adults) guiding the youth teams as mentees. Mentoring helps participants expand their awareness of complex social problems (Hughes et al., 2009). The goal is that the team interactions with the mentors will provide the support they need along the way. Such adult-mentored relationships are a key means of bringing the mentees' innovative ideas to fruition, as the mentors would help them identify community resources and network with key players in the community.

Training. The training content features these key topics: diversity, mentorship, leadership of social change, and social entrepreneurship. Training provides tools that enhance the creation and sharing of knowledge.

Coaching support. In addition, mentoring/coaching is integrated to ensure a supportive learning environment and reflection opportunities beyond the training and to identify any new issues that emerge as the participants plan and implement their innovations. The interactions are specifically designed to foster relationship building. The collaborators are part of this coaching support team. Following established mentoring relationships and successful integration, the teams would then decide on what social innovations to engage in, guided by their mentors and coaches. It is worth noting that the activity selection is based upon needs within the community and the team's talents to ensure that they are targeted and sustainable.

Community Service/Service Learning. One of the approaches used in cementing the newly acquired skills included service learning (community service). Volunteer opportunities are in-built into this program in order to create opportunities for new immigrants and local community members to interact as they engage in volunteer (service-learning) experiences. One of the goals of service-learning is to increase community involvement and awareness of social justice issues and to ―challenge negative stereotypes and assumptions about individuals from culturally diverse backgrounds, particularly those from disenfranchised or marginalized groups"(Hughes, et al., p.69).

Program Outcomes

In terms of short-term results, the key indicators are program participation and completion, participation in team-oriented activities, and gaining key competencies (new attitudes, knowledge skills, and abilities) to engage in what is sometimes called ―servant leadership, ―one that puts the needs of others or service first. In the medium term, the outcomes are changes in actions that translate in leadership practices/behaviours evident through the establishment of solid collaborative social innovations including social enterprises. The overall impact is to have leaders who will lead social innovations that enhance both personal and community development. Further, rural communities would continue to attract and retain immigrants – indicative of ―welcoming" and thriving communities. Continued revenue generation as a result of the social entrepreneurial approach adopted by this program would mean sustainability of resources and the ASCENT program. Sustainability is an important facet for developing this program hence the integration of entrepreneurial approaches that would continue to generate revenues for this program, long after the grant funding is over.

Conclusion

This paper examined one program's approach to addressing social and economic needs. It features various dimensions of program planning and design through the use of a logic model, designed for a leadership development program for multicultural youth and young adults. The goal is to develop participants as leaders of social innovations. Social

entrepreneurship is suggested as a potential vehicle for encouraging innovation, promoting inclusion, and reducing out-migration, which occurs whenever social and economic needs are not met. It explored various leadership development approaches including mentorship (cross-cultural, peer, and group mentoring), coaching support, service learning (community service), and training. A collaborative approach that engages a government agency, non-profit institutions, and a social enterprise was featured.

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THE MIDDLE- AND OLD-AGED PEOPLE'S LEARNING PARTICIPATION IN TAIWAN: THE RESULTS OF A NATIONAL HOUSEHOLD SURVEY

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ABSTRACT: Through rapid increase of the aged population, the average life expectancy of human beings has been consistently postponed. The development of elder education in Taiwan has gradually infused an educational perspective into the pervious orientation of welfare service dominated by government. However, still lacking was a comprehensive overall study of learning among the aged in Taiwan. This study applied the 2008 database of adult education investigation in Taiwan and Fukien areas and analyzed the learning participation situation of mid-old aged individuals, aged 45 or above. The results found that first, the learning participation declined with an increase in age. Only 11.4% of people aged 65 and above participate. Second, participation motivations of mid-old aged people are primarily for cognitive interests and vocational advancement while it would turn to cognitive interest only with the increase of age. Third, participation barriers of learning are mainly situational. With an increase in age, the ratio of dispositional barriers increase. Fourth, females under age 65, and with higher education background and income, are more likely to participate in learning activities. Several recommendations for practice are provided.

Introduction

Aging of the population is already a global trend. In 1993, the population aged 65 and above had surpassed 7% of total population in Taiwan, which reached the aging society indicator of WHO (World Health Organization). This year (2010), the number has reached 10.7% and the Council for Economic Planning and Development of Executive Yuan predicted that the number would increase to 14.0% in 2017 and Taiwan then would become a so called-aged society; the number is predicted to further increase to 20.1% in 2025 and Taiwan would step into a so-called super-aged society(CEPD, 2010).

It takes 24 years for an aging society to transform to a super-aged society while it takes only 8 years for an aged society to transform to super-aged society, which suggests that the aging process in Taiwan is accelerating. In 2056, the aged population is predicted to exceed one third (37.5%) of total population (CEPD, 2010).

Through the rapid increase of an aged population, the average life expectancy of a human being has been consistently postponed. Old age accounts for one-third of a person's life and the life after retirement, which may last over 30 years, is also prolonged, (Huang, 2004). For example, time spent in life time employment is about 80,000 hours (8 hours ×

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250 days/year × 40 years). However, after retirement, but before becoming senile or permanently bed-ridden, people still have about 87,600 hours to do something (12 hours (excluding sleeping and eating) × 365 days/year × 20 years). In other words, people should make use of the tremendous time to thrive in the second half of life.

The development of elder education in Taiwan has gradually infused educational perspectives into the pervious orientation of welfare service dominated by government. The ―Lifelong Learning" and ―Senior Education Policy" suggest that the elder education was getting the attention of the education sectors in the government. From 2008, the Ministry of Education planned to establish the ―Active Aging Learning Center" throughout Taiwan within three years and has already constructed 202 Centers. However, still lacking was a comprehensive study on learning during the elder years in Taiwan. During 1991, the Ministry of Education conducted the ―Study on the aging learning preferences and contents in Taiwan," but 19 years have now elapsed. The ―Analysis on current situation of old age education in Taiwan" in 2006 did not adopt a random sampling method and therefore it was difficult to accurately estimate the participation of senior citizens. Therefore, this study applied the 2008 database of adult education investigation in Taiwan and Fukien areas and analyzed the learning participation situation of mid-old aged, 45 or above. Results revealed that people who aged most successfully were those who carried forward the habits, preferences, lifestyles and relationships from midlife into late life. For that reason this study focused on the middle and old age people.

The research purposes were as follows:
1. Comprehend the percentage of mid-old aged individuals participating in adult education.
2. Identify the motives and future obstacles of the participants.
3. Analyze the effects of population background on the learning participations of those mid-old aged.

Research Target

This study is based on the 2008 database of adult education investigation in Taiwan and Fukien areas. The sample in this database included 400 samples in each of the 25 districts in Taiwan (including Jinmen and Lianjian in Fukein Province) for a total 10,000 samples. The ages ranged from 16 to 97 years old. With a 95% confidence level the sampling error is between +/-0.98%. This database resulted from the first nationwide sampling in Taiwan; the data collection method was the Random Digit Dialing (RDD) in Computer Assisted Telephone Interview (CATI). The interview is conducted with the required sampling family with resident(s), aged 16 years and above, in 25 districts in Taiwan. The respondents answered all the questions in the questionnaire. The random sampling was processed according to the list of area codes of each district in Taiwan and Fukien areas.

Such statistics would reflect the learning participation of the population in Taiwan and was able to conduct the analysis on the population with different social backgrounds to identify the formal learning participation of adults in Taiwan and Fukien areas. The study focused on the middle- and old- aged people age 45 and above.

Research Method

This study adopted the secondary data analysis method to use the statistical academic database of the 2008 Adult Investigation in Taiwan and Fukien area (Wu, Li & Lai, 2009), and analyzed the learning participation situation of mid-old aged individuals in Taiwan with descriptive and inferential statistics, the latter including correlations among mid-old aged participants with different backgrounds, and multiple regression.

Findings and Results

Overall Circumstance

The ratio of mid-old agers' participation in learning. Table 1 shows that the people aged 45 to 54 have the highest participation rate in learning (30.58%); the next highest are those aged 55-64 (23.93%); while only 11.4% of people aged above 65 participate in learning. The participation tendency appears to decline according to an advance in age.

Table 1

Participation Rate by Age

	Yes	No	Total
45~54	796(30.58%)	1,807(69.42%)	2,603
55~64	370(23.93%)	1,176(76.07%)	1,546
65~	102(11.40%)	793(88.60%)	895
Total	1,268(25.13%)	3,776(74.87%)	5,044

The sex factor in learning participation. Table 2 shows a significant difference in the mid-old agers' participation in learning by sex ($\chi^2(1)$= 33.879 , p<0.001). The ratio of learning participation of female is higher than male.

Table 2

Participation by Sex

		Participation		Total
		No	Yes	
Sex	Male	2,020	542	2,562
		78.8%	21.2%	100.0%
	Female	1,836	720	2,556
		71.8%	28.2%	100.0%
Total		3,856	1,262	5,118

$\chi^2(1)$= 33.879 , p<0.001

The inclination of participation in the future. When asked their inclination to participate in learning in the future, people aged 45 to 54 have the highest percentage (73.42%); the next highest is age 55 to 64 (63.26%); the final one is the people 65 and above (35.31%). The inclination of future learning appears to decline with an increase in age. However the ratio is higher than actual participation. Obviously, so that more older aged people would be willing to participate, the government and related sectors still need devoted efforts in order to further understand the factors associated with non-participation and barriers encountered.

Table 3

The Inclination of Participation in the Future

	Yes	No	Total
45~54	1,911(73.42%)	692(26.58%)	2,603
55~64	978(63.26%)	568(36.74%)	1,546
65~	316(35.31%)	579(64.69%)	895
Total	3,205(63.54%)	1,839(36.46%)	5,044

The Motivations and Learning Patterns of Participants

Patterns of participation motives. From the three age tiers, the highest participation motivations for people aged 45 to 54 is cognitive interest (43.09%) and the next is vocational advancement (39.57%) yet these two differ only 4%. The other motives are external expectations, social service, escape or stimulation, and social relationship in descending order. These four also have very close percentages. As for people aged 55 to 64, their highest motivation is cognitive interest (52.17%) and the next is vocational advancement, followed by social service (8.38%). Social relationship and escape or stimulation have the same percentage; both are 4.59%. The final one is external expectations. For people aged 65 and above, cognitive interest is the highest (73.54%) followed by escape or stimulation, social relationship, social service, vocational advancement, and external expectation.

Table 4

Types of Learning Motivation

	Vocational advancement	Social Service	Social relationship	External expectations	Escape or stimulation	Cognitive interest	total
45~54	315 (39.57%)	34 (4.27%)	25 (3.14%)	51 (6.41%)	28 (3.52%)	343 (43.09%)	796
55~64	97 (26.22%)	31 (8.38%)	17 (4.59%)	15 (4.05%)	17 (4.59%)	193 (52.17%)	370
65~	5 (4.90%)	6 (5.88%)	7 (6.86%)	1 (0.98%)	8 (7.84%)	75 (73.54%)	102
Total	417	71	49	67	53	611	1,268

Types of learning participation. For those aged 45 to 54, the type of participation is primarily vocational adult education; for age 55 above, primarily general adult education as shown in table 5.

Table 5

Types of Participation

	Vocational AE	General AE	Total
45~54	477 (56.05%)	374(43.94%)	851
55~64	154(39.28%)	238(60.71%)	392
65~	13(12.74%)	89(87.26%)	102
Total	644(47.88%)	701(52.12%)	1,345

Participation motivation by sex. From table 6 it is found that there is a significant difference between two sexes' learning participation motivations ($\chi^2(5)=$ 55.989 , p<0.001). Motivations of males are mainly for vocational advancement (43.2%) and cognitive interest is the second highest, while females have cognitive interest as their primary motivation (55.0%) and vocational advancement is second (25.1%).

Table 6

Participation Motivation by Sex

		Participation Motivation						
		Vocational advancement	Social Service	Social relationship	External expectations	Escape or stimulation	Cognitive interest	Total
Sex	male	234	27	19	36	16	210	542
		43.2%	5.0%	3.5%	6.6%	3.0%	38.7%	100.0%
	female	181	49	35	29	30	396	720
		25.1%	6.8%	4.9%	4.0%	4.2%	55.0%	100.0%
total		415	76	54	65	46	606	1262

$\chi^2(5)=$ 55.989 , p<0.001

The Barriers of Participation and Preferred Information Channel

Types of participation barriers. The study identified four factors that create barriers to elders learning participation, including situational, institutional dispositional (Cross, 1981), and informational (Huang, 2004). For non-participants aged 45 to 54, most (70.34%) have situational barriers and some have dispositional barriers (17.82%) while the other barriers are institutional barriers and information barriers in sequence. Non-participants aged 55 to 64 share the same features with the former, mostly have situational barriers (60.28%); some have dispositional barriers (27.98%) and the others are institutional barriers and information barriers in sequence. For people aged 65 and above, there are some differences. They similarly face the situational barriers but the percentage is only 47.8% while the percentage of dispositional barriers is 41.74%. The rest are informational barriers and institutional barriers in sequence.

Table 7

Types of Participation Barriers

	Situational barriers	Institutional barriers	Dispositional barriers	Information barriers	Total
45~54	1,271(70.34%)	143(7.91%)	322(17.82%)	71(3.93%)	1,807
55~64	709(60.28%)	81(6.89%)	329(27.98%)	57(4.85%)	1,176
65~	379(47.80%)	38(4.79%)	331(41.74%)	45(5.67%)	793
Total	2,359	262	982	173	3,776

Participation barriers by sex. According to table 8, sex is the crucial factor of participation barriers ($\chi^2(3)$= 42. 895, p<0.001). The barriers for males are primarily situational ones and the next is dispositional barriers and females have the same sort while the percentage of situational barriers is higher than for males and the percentage of dispositional barriers is lower.

Table 8

Participation Barriers by Sex

		Situational barriers	Institutional barriers	Dispositional barriers	Information barriers	Total
sex	male	1,020	141	768	91	2,020
		50.5%	7.0%	38.0%	4.5%	100.0%
	female	1,099	131	519	87	1,836
		59.9%	7.1%	28.3%	4.7%	100.0%
Total		2,119	272	1287	178	3,856

$\chi^2(3)$= 42. 895, p<0.001

Preferred information channel. The information barriers are not the primary barriers that inhibit people at mid-old age from participating in learning. To identify their preferences on the information channel, however, would help elder education institutes promote the curriculum based on the population features. For people aged 45 to 54, the most preferred channel is through internet (29.78%) the next is flyers and newspapers (24.57%), and the third is radio and television, while others include recommendations by others and brochures of registration in sequence; for people aged 55 to 64, the most preferred channel is radio and television (30.01%), followed by flyers and newspapers; the third is recommendation from others, the fourth is internet with the same percentage of the previous age group, and the last is brochures of registration; for people aged 65 and above, the most preferred channel is radio and television (37.46%), the next is flyers and newspaper, the third is recommendation by others, and the rest are internet and brochures of registration in sequence.

Table 9

Preferred Information Channel

	Recommendation by others	Internet	Flyers and newspapers	Brochures of registration	Radio and television	total
45~54	318 (15.03%)	630 (29.78%)	520 (24.57%)	166 (7.84%)	482 (22.78%)	2116
55~64	218 (19.41%)	195 (17.36%)	297 (26.45%)	76 (6.77%)	337 (30.01%)	1123
65~	103 (22.44%)	30 (6.54%)	133 (28.98%)	21 (4.58%)	172 (37.46%)	459
Total	639	855	950	263	991	36

Predicting participation with demographic variables. The multiple logistic regression model showed that women were 2.41-fold more likely to attend learning activities (OR: 2.41, 95% CI: 2.07~2.82, $p < 0.001$). People aged 65 years and above were less likely to join learning activities (OR: 0.68, 95% CI: 0.54~0.88, $p = 0.002$). The locations of the respondents, either urban, suburban, and rural, did not affect the propensity to participate ($p = 0.109$), while increased educational level significantly influenced the opportunity. As compared to those with an elementary degree, the respondents with junior high, senior high, college, university, and graduate school degrees had 1.77, 3.80, 6.44, 8.80, and 14.6-fold odds to attend learning activities. Personal annual incomes also significantly increased the chance of participations (Table 10).

Predicting Participation with Demographic Variables

	Odds Ratio	95% confidence interval		p-value
Sex (women vs. men)	2.41	2.07	~2.82	<0.001
age > 65 vs. age < 65	0.69	0.54	~0.88	0.002
location				0.109
city vs. rural area	0.79	0.63	~0.98	0.036
suburban vs. rural area	0.84	0.69	~1.03	0.100
Education level (compared to elementary degree) junior high	1.77	1.28	~2.46	0.001
senior high	3.80	2.89	~5.00	<0.001
college	6.44	4.75	~8.75	<0.001
university	8.80	6.47	~11.97	<0.001
graduate school	14.66	9.53	~22.54	<0.001
Income (compared to no income)				<0.001

annual income < NT$300,000	1.30	1.06	~1.60	0.011
annual income < NT$600,000	1.37	1.10	~1.71	0.005
annual income < NT$1,000,000	2.59	2.03	~3.31	<0.001
annual income > NT$1,000,000	3.94	2.96	~5.24	<0.001

Discussion

The results above can be concluded as follows:

1. For the ratio of learning participation of mid-high aged people in Taiwan, the highest is people at age 45 to 54 (30.58%); the next is age 55 to 64 (23.93%); while people at age 65 and above at only 11.4%. The learning participation declines with an increase of age. Such results resonate with investigations conducted in Germany, UK, Australia, and Korea, that is the participation ratio would gradually decline after age 50 and would remarkably drop after age 60.

2. The participation motivations of mid-old aged people in learning are primarily cognitive interest and vocational advancement with an inclination to cognitive interest with an increase of age.

3. The participation barriers of learning are mainly situational in nature, that is unable to go out and learn alone due to the demands of taking care of offspring or family, lacking transportation, or unsupportive family. However, with an increase in age, the ratio of dispositional barriers rises. To summarize, the old aged people may consider that participating in learning activities would not have benefit to their lives, so there is no point to learn and consequently, are not interested in learning; or they may worry about being frustrated during learning and lose their confidence; some may even believe that old people are unable to learn.

4. For the preference of information channel, people at age 45 to 54 prefer internet while people above age 50 prefer television. Clearly, it has much to do with the living pattern of different ages. People at older age may not be familiar with internet technology therefore they tend to gather information from radio and television. Meanwhile, the brochure of registration obtained the lowest scores in three age tiers therefore it is obviously not an effective promoting channel.

5. Females at mid-old age have a higher learning participation rate than males. Lamdin & Fugate (1997) had similar findings as well. Lin (2002) further indicated that females were the major mid-old aged participants in learning activities. After further analyzing the participation motivations, their results showed that the motivations of females are basically in cognitive interest while males are primarily for vocational advancement. Therefore, once males leave the working field, they are less willing to participate in learning if there are no strong or practical attractions. As for the barriers of non-participants, results revealed that males mostly have situational barriers and the next was dispositional barriers; females have more situational barriers than males while the

dispositional barriers are less than for males. Therefore, the non-participation in learning for female mostly resulted from situational barriers. Although males are under the influences of situational barriers as well, their major factor of non-participation in learning may also be their ideas, values, and attitudes toward learning.

6. Females under age 65 and with higher education background and income are more likely to participate in learning activities. This finding was yielded after using logistic regression to analyze the variables of sex, age (above age 65 or not), residency (city, remote area, country), education background, and income. Pearce (1991) and Lamdin & Fugate (1997) also found that the learning participation peak was from age 60 to 64 and after age 64, the inclination would decline The National Center for Educational Statistics (NCES) in the USA found that mid-old aged people with higher education backgrounds have higher percentages of participation in learning than those with lower education backgrounds (Dickerson, Seelbach, & Dietz, 1990). In addition, Lin (2002) suggested that most participants consider themselves with competent financial status while non-participants consider themselves having difficulties in finance. Therefore, the social and economic status seems to determine whether mid-old aged people participate in learning activities.

Suggestions

Suggestions were proposed according to the findings above:

1. Actively improve the learning participation rate of mid-old aged males to eliminate the learning gap between sexes.
The adult education participation rates of both sexes in the developed countries of EU are approximately the same and there is no learning gap between sexes. However the percentage of mid-old aged females in Taiwan and Fukien areas participating in learning is 28.2% while the percentage of males is 21.20%. There is a gap of 7% between two sexes. This research found that the participation motivations of males are primarily for vocational advancement (43.2%) and the next is cognitive interest (38.7%), which differs 4.5%. One might say that males are learning in order to make professional progress, achieve working objectives, strive for promotion, or advance their professional potential. Therefore, their learning participation rate may decline after the working factor is removed.

It is suggested that the adult and old aged education institutes conduct a general investigation to identify the preferred learning patterns, curricula, and barriers of male learners to provide the curricula associated with their learning demands and further promote the learning participation rate of males. On the other hand, adult education institutes should encourage males to develop personal interests and active learning attitudes, such as the cognitive interests or fulfill the spiritual demands, prepare for further education, obtain new information, or make up for insufficient education.

2. Provide the learning delivery services

Old aged education institutes can adopt a ―volunteer teaching‖ method and deliver the education to the places of old aged people or learning disadvantaged groups so that people with health problems who are unable to go out can learn at home. Since 2008, the learning resource centers in many districts established by the Ministry of Education have provided many daytime programs for old aged people. These kinds of resources should be effectively used so that old aged people can participate in learning nearby and more diverse learning opportunities would be created.

3. Apply multi-promoting strategies for different target groups

The study showed that mid-old aged people obtain learning information mostly from the internet in Taiwan and Fukien areas; the next is flyers and newspapers; the third is radio and television. People aged 65 above obtain information mostly form radio and television, then flyers and newspapers, and then recommendations by others. Therefore, we suggest that the adult and old aged education institutes in each district adopt multi-promoting strategies for different target groups. Apply television and radio or public praise promoting for old aged people who rarely use the internet to effectively expand learning information and opportunities.

4. View learning as a meaningful life style

This study found that the percentage of people aged 55 to 64 participating in formal and informal learning was 23.93% while the percentage of people at age 65 above is only 11.40%. The percentage of dispositional barriers of people aged 55 to 64 is 27.98% while people above age of 65 is 41.74%. Results showed that the percentage of individuals participating in formal and informal learning would gradually decline with the increase of age while the effect of those ―not interested in learning‖ and ―lacking of confidence to learn‖ would increase. However, participation in informal learning should not be influenced by age because learning is life and vice versa. Lifetime learning is a kind of lifetime beneficiary living style therefore we should view learning as a meaningful life style. For example, it can be learning for the retirement plan, to learn live related information or expand personal interests, rather than professional knowledge for work. It is also important to make good use of the informal learning channels, for instance, learning from the television, radio, reading or any accessible learning media in life. In addition, participation in learning would also assist in expanding social circles and making new friends and further improve the learning interests and confidences of adults and old aged people.

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TRANSCENDING THE LOCAL: IDENTIFYING EFFECTIVE TECHNICAL EXECUTIVES' LEADERSHIP BEHAVIORS AND ATTRIBUTES FOR THE GLOBAL KNOWLEDGE ERA

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ABSTRACT: "What are the behaviors and attributes that enable individuals to become successful executives at NASA?" was the underlying question of NASA's 2010 study, *Executive Leadership at NASA: A Behavioral Framework* (Williams, Derro, Jarvis, & Morris). Participants included NASA executives who served at some point in their NASA careers as technical managers of projects requiring systems development, possessed a systems engineering orientation, and successfully applied those talents and behaviors in their executive roles—who in other words were ―Technical Executives." Identified behaviors and attributes were clustered into six themes: leadership, attitudes and attributes (including executive presence), communication, problem solving and systems thinking, political savvy, and strategic thinking. NASA is using study results to enhance development of these critical behaviors via learning and development activities including classes, knowledge sharing, coaching and mentoring. These findings may also be applicable to technical executives in other organizations, industries and countries. Among findings are specific examples of problem solving and systems thinking behaviors used to deal with complex workplace problems. These results provide real-world descriptions that may help researchers better understand systems thinking, a progressively more important capability in dealing with the globe's ever increasing complexity. In this paper I will describe the NASA executive behavior study, its approach, method, results, recommendations, and implications, as well as a follow up study engaging a group of international executives. The purpose is not only to share results, but also to initiate a broader dialogue on effective technical executives' capabilities.

Executive Leadership at NASA: A Behavioral Framework (Williams, Derro, Jarvis & Morris, 2010) is the second of two studies NASA's Office of the Chief Engineer conducted to identify characteristics or behaviors frequently observed in highly regarded systems engineers and technical executives. The purpose of these studies has been to develop shared understanding and agreement across NASA regarding the practice of systems engineering, a core competency critical to NASA's success, and of the behaviors and attributes that enable highly regarded technical managers and executives to be successful.

Study Overviews and Goals

Participants in the first study, the *NASA Systems Engineering Behavior Study* (Williams & Derro, 2008)*,* were 38 civil servants actively engaged in systems engineering roles at NASA field centers and identified by their centers as highly regarded. The study's goal was to identify and accelerate development of effective behaviors in systems engineers and to help NASA's engineering leadership more quickly identify and support development of employees with high potential for future systems engineering leadership positions. NASA has used study findings to design and update systems engineering learning and development, coaching, and mentoring programs including its new 12-month Systems Engineering Leadership Development Program (SELDP). SELDP

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includes a rotational development assignment, classroom courses, coaching, mentoring and 360-degree feedback assessment, based on behaviors identified in the *NASA Systems Engineering Behavior Study*. Four months after the first (2008-2009) SELDP class completed the program, eighty percent had successfully transitioned into challenging positions, in which they could use knowledge and skills gained during the year, meeting a primary program goal (Morris, 2010). According to NASA SELDP Program Director Christine Williams, this high percentage is especially notable because the percentage of successful reassignment in challenging positions for previous development programs had been 20-25% in 18 to 24 months (Williams, personal communication, September 16, 2010).

Before the first study began, the Office of the Chief Engineer and former NASA Administrator had determined that the differences in the roles and responsibilities of practicing systems engineers and NASA executives using systems engineering skills warranted separate studies (Williams et al., 2010).

The second study, *Executive Leadership at NASA: A Behavioral Framework* (Williams et al., 2010)*,* discussed in this paper, was conducted from June 2008 to March 2009. A study team investigated behaviors and attributes of 14 NASA executives whom agency leadership identified as highly effective in their roles. Located at both NASA Headquarters and field centers, these executives possessed a technical background and a systems orientation that had contributed to their success. Study methods mirrored that used in the *NASA Systems Engineering Behavior Study* (Williams & Derro, 2008). The team interviewed, observed and shadowed participants. It identified a shared set of effective executive behaviors evident across centers. Findings reinforced and extended those of the previous study. An end result was the development of a behavioral framework for technical leaders seeking to transition into or already in executive roles.

Approach

NASA leaders determined to focus on identifying behaviors that enabled executive, that is mission, success. This approach was most related to Approaches Based on Skills and Competencies in Table 1, which posits five different approaches to explore leadership, based on a comprehensive review of empirical and theoretical leadership scholarship. However, findings linked to other approaches as well. For example, 58 (25 %) of 225 identified behaviors and attributes were related to problem solving and systems thinking (Approaches Based on Complexity). Others addressed building relationships and networks and managing multiple factors (Approaches based on Sociology and Balancing People and Tasks). The study also recorded participants' Myers-Briggs Type Indicator preferences (Approaches based on Psychology). Thus, exploring scholarship related to a variety of approaches may increase understanding of results and implications and help identify a variety of approaches to build capabilities in specific areas of development.

Table 1

Five Approaches for Viewing Leadership

Category	Description	Representative Theorists
Approaches Based on Psychology and Biology	Personal characteristics provide unique qualifications for person's ascendancy or success. Focus is on, for example, traits such as vision, confidence, charisma, and openness to learning.	Carlyle, Bennis & Nanus, Kouzes & Posner, Maxwell, Collins, Gardner. Goleman
Approaches Based on Sociology	Includes looking at the group or culture a leader influences, the relationships between leader and follower, informal networks and relational leaders.	Burns, Greenleaf, Block, Covey, Kouzes & Posner, Pearce, Mohrman, & Cohen
Approaches Based on Balancing People and Tasks	Distinguishes between leadership behavior and interaction; identifies leadership continua with situational approaches; examines match between leaders and followers or concern for production and concern for people. Examples include Path-Goal Theory and Normative Decision Theory,	Tannebaum & Schmidt, Fiedler, Hersey & Blanchard, Blake & Mouton. Albano
Approaches Based on Skills and Competencies	Focus is on leadership competencies, knowledge, and skills and on examining differences among leadership levels; reinforced by legal requirements for job analysis and validated selection criteria. Relates ideas of leadership competency and organizational strategy; highlights need to maintain organizational knowledge.	Herzberg, Mausner, Snyderman, Prahalad & Hamel, Weick,
Approaches Based on Complexity	Focus is on ability to understand complex systems and execute organizational change. Emphasizes the organizational life cycle to demonstrate how leadership requirements shift, to diagnose critical business issues and to effectively balance internal and external requirements and interdependencies.	Kotter, Lippitt & Schmidt, Adizes, Lippit, Senge

Note: Adapted from Bear, D. J., Dennis, D. J., Forcade, J. W., Groe, G. M., Lippitt, M. B., & Vickers, M. R. (2005). *Leading Into The Future: A Global Study Of Leadership: 2005-2015,* pp. 2-4.

Method

Participants

NASA leaders selected study participants whom they considered ―highly successful" executives to participate in this executive behavior study (Williams et al., 2010). These were ―technical executives.' The majority of executives were from NASA's systems engineering community; others had different backgrounds (e.g., project management). All had a systems orientation[2] and a technical background in one or more engineering sub-disciplines. One participant was retired. The remaining executives worked at NASA Headquarters or one of the NASA field centers.

Systems engineering is a critical core competency for successful NASA missions. According to former NASA Administrator Mike Griffin (2007), who commissioned this study, ―System [sic] engineering is the art and science of developing an operable system capable of meeting requirements within imposed constraints" (p. 6). He also noted that

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[2] Systems orientation implies the active use of systems engineering principles and processes.

> System [sic] engineering is a holistic, integrative discipline, wherein the contributions of structural engineers, electrical engineers, mechanism designers, power engineers, and many, many more disciplines are weighted and considered and balanced, one against another, to produce a coherent whole that is not dominated by the view from the perspective of a single discipline. System [sic] engineering is about tradeoffs and compromises, about generalists rather than specialists. (p. 7)

In a subsequent paper, a group of experienced NASA Systems Engineers, shared their perspectives on systems engineering, dividing it into two parts (Bay et al., 2009, p.3):

- Technical leadership (the art), which focuses on a system's technical design and technical integrity throughout its lifecycle.
- Systems management (the science), which focuses on managing the complexity associated with having many technical disciplines, multiple organizations and hundreds or thousands of people engaged in a highly technical activity.

NASA's project managers have similar broad integrative functions. They are responsible for guiding complex, multi-year, global, billion dollar projects through all phases of the project lifecycle, within time, budget and design constraints. NASA views such project managers and managerial level systems engineers as technical managers and technical executives (Williams et al., 2010).

Data Gathering and Analysis

Study team members had education and experience in organizational development and/or training and development, as well as experience working on the *NASA Systems Engineering Behavior* Study (2008).

One or more of the study team members shadowed and/or observed each of the executive participants and conducted 60- to 90- minute interviews. The team asked participants identical questions, which had been vetted and approved by the NASA Chief Engineer, with follow-up questions based on initial answers. Interview questions were divided into two categories: context and relation to self and personal awareness (see Table 2).

Table 2 (continued on following page)

Executive interview questions

Context Questions
1.   How would you describe the role of an SE executive

Relation to Self and Personal Awareness
2.   Describe top performing executive SE's in behavioral terms?
3.   Think of a top performing SE executive whom you have worked with, or for.   What do you

remember most about how they behaved and the impact that behavior had on the organization's goals?

4. Think of a top performing SE executive whom you have worked with or for, what do you remember most about how they behaved.

5. In what ways, if any, did these behaviors impact the organization's goals?

6. What do you think are the differences between your behavior as an SE on a project and you as a SE executive?

7. What distinguishes a SE executive from other NASA executives?

8. When you think of someone who failed as a SE executive, what was missing/ different about that person?

9. Describe what goes on in your mind when you are problem solving.

10. Has this changed since you became an executive?

11. Describe top performing executive SE's in behavioral terms?

The shadowing process included a minimum of one day observing executives perform their day-to-day activities. In addition, study team members attended meetings and events that executives were either leading or participating in. Events observed included, but were not limited to, staff meetings, program, project or technical reviews, one-on-one discussions, brainstorming sessions, press interviews, and strategy meetings.

The study team transcribed interviews, compiled results, and analyzed them for common themes, identifying elements of each theme and associated representative observable behaviors and attributes. The Chief Engineer then sent draft results to interviewees for validation and verification.

Results

Overview

Executive Leadership at NASA: A Behavioral Framework (Williams et al., 2010) focused on determining behaviors and attributes of highly effective executives who were at one time technical managers, and its purpose was to identify those behaviors and attributes that enable individuals to be successful executives within the agency. The behaviors/attributes exhibited by the 14 participating NASA executives fell into six broad themes. Four of these—leadership, attitudes and attributes, communication, and problem solving and systems thinking—were among five broad themes identified in the earlier study. The first study, but not this one, also included a technical acumen theme. In this study, executive presence emerged as a sub-theme within attitudes and attributes, and two new themes, political savvy and strategic thinking, surfaced. While participating executives at NASA centers and headquarters shared common sets of behaviors around all themes, team members noted some differences in behaviors related to communication and political savvy.

Within the six themes, the team identified a total of 54 separate elements and 225 representative/ observable behaviors and attributes (Williams et al., 2010). For example, for one element in the communication theme, *assesses context*, observed behaviors were:

- Knows when and how often to communicate. Assesses the context before speaking. Senses others' needs to argue a point, vent a frustration, solicit feedback, etc., and responds accordingly.
- Knows what is the right level of communication for each situation. Strikes the right balance in communicating what is needed, but not more. (p.14)

The themes, sub-theme and elements, and observable behaviors and attributes provide a broad perspective on the behaviors and attributes of highly effective NASA executives for those who wish to transition to these roles or develop within them. They may also be useful in identifying behaviors that bring success to technical executives in other settings. See *Executive Leadership at NASA: A Behavioral Framework* (Williams et al., 2010) for narrative descriptions of each theme (pp. 7-9) and Tables 4-9 (pp. 11-21) for a comprehensive view of themes, elements, behaviors and attributes. Highlights follow.

Leadership

The 12 leadership elements and 50 observable behaviors of highly effective NASA executives illustrated a focus on the organization and its people. Elements included: (*a*) *creates organizational structures to support mission success, (b) gauges resources needed to achieve mission objectives, (c) manages at the appropriate level, (d) accepts change and are resilient* and (*e*) *acts decisively*. Working with others, an effective executive *(f) inspires and motivates team members to perform at peak performance, (g) builds trust and respects confidentiality, (h) builds employee capabilities,* and (*i*) *reduces workplace distractions (*for employees). Such an executive is (*j*) *aware of self and values, (k) develops self,* and (*l*) *lets go of current role to prepare for new one.*

Attitudes and Attributes

The study identified 6 elements and 20 representative observable behaviors in the attitude and attributes theme. While three elements were more general *(remains inquisitive and curious, is patient,* and *is organized*), the other three clustered in a sub-theme, ―executive presence." These included: *displays self-confidence and courage, remains calm under pressure,* and aware *of how personal presence and behavior affects others.*

Communication

The greatest number of representative behaviors (60, with 6 behaviors observed only in headquarters personnel) appeared within the 13 elements of the communication theme. Many seemed to relate to highly effective executives' mastery of communication. Included were*: (a) communicates throughout the organization, (b) tailors messages, (c) strives for clarity, (d) assesses context, (e) uses humor, (f) practices effective speaking and listening skills*, and *(g) communicates through storytelling and analogies* Executives

communicate strategically and collaboratively. Related elements were: *(h) links people, organizations and ideas, (i) encourages participation, (j) seeks expert opinion, (k) builds consensus, (l) builds relationships through interaction,* and *(m) demonstrates accessibility.*

Problem Solving and Systems Thinking

The problem solving and systems thinking theme, also with 13 elements, included the second highest number representative behaviors/attributes (58). Two of the elements dealt with ways of thinking: *(a) uses systems perspective and (b) thinks systemically. Others focused on specific actions: (c) identifies and defines core issues/problems, (d) actively probes for information and understanding, (e) finds connections and patterns across systems, (f) assimilates, analyzes and synthesizes data and information, (g) validates facts, information and assumptions, (h) considers all options before deciding,* and *(i) identifies, assesses and manages risks.* Also included were: *(j) acknowledges and manages uncertainty, (k) remains open-minded and objective, (l) uses creativity to solve problems,* and *(m*) *draws on past experience.*

Political Savvy

The political savvy theme included 5 elements: *(a) knows how the political system works, (b) has political staying power, (c) represents/promotes NASA programs across the political spectrum, (d) manages multiple demands/opportunities*, and *(e) provides a historical perspective.* Four of the related 19 observed behaviors and attributes were observed only in headquarters personnel.

Strategic Thinking

Among the 5 elements incorporated in the strategic thinking theme, which contained 19 related behaviors and attributes, were: *(a) maintains an agency-wide view, (b) manages near- and long-term goals, (c) understands broad implications of activities at multiple levels, (d) monitors the environments,* and *(e) uses networks.*

Conclusions and Implications

The 14 NASA executives interviewed and observed for NASA's executive behavior study exhibited a common set of specific behaviors and attributes that were instrumental to their success (Williams et al., 2010*).* These behaviors and attributes are observable and measurable and are similar to those demonstrated by highly successful systems engineers (as described in the 2008 *NASA Systems Engineering Behavior Study).* They fell into six broad thematic categories. Four of these—leadership, attitudes and attributes, communication, and problem solving and systems thinking—were among the five top themes identified in an earlier study of systems engineers. In this study executive presence emerged as a sub- category within attributes and attributes, while technical acumen fell out. Two new themes—political savvy and strategic thinking—were unique to executives. Also noted were some differences in communication and political savvy behaviors exhibited between NASA center and headquarters executives.

The study provided a behavioral framework for technical managers seeking to transition into or continue to grow in executive roles. NASA is using study results to enhance development of these critical behaviors via learning and development activities including classes, knowledge sharing, coaching and mentoring.

The study team (Williams et al., 2010) posited that because many of the identified behaviors were consistent with those of highly regarded systems engineers, who were technical managers, employees could build upon those foundational skills as they transitioned into executive roles. The team also contended that the behaviors are mainly relational, ―broad integrative thinking competencies that can be practiced, learned and developed at any level at NASA, given the right experience and exposure ‖ (Williams et al., 2010, p 23)--an assertion that Boyatzis (2009) might agree with. He posited that there are ―three clusters of competencies that differentiate outstanding from average performers in many countries of the world‖ (Boyatzis, 2009, p. 753). These are:

1. Cognitive competencies, such as systems thinking and pattern recognition.
2. Emotional intelligence competencies, including self-awareness and self-management competencies, such as emotional self-awareness and emotional self-control.
3. Social intelligence competencies, including social awareness and relationship management competencies, such as empathy and teamwork. (p.754)

Some of the results from this qualitative study also seem to echo findings from *Leading Into The Future: A Global Study Of Leadership: 2005-2015* (Bear et al., 2005). In that survey of 1,653 international managers, communication skills and strategy development led the list of competencies viewed as important, in 2005, and expected to still be important in 2015.

This study is serving as a basis for further investigation. Additional research holds the possibility of providing a behavioral framework for technical executives and leaders that will be applicable beyond NASA and more comparable to other explorations. Moreover, NASA has a global, indeed an interplanetary focus. Since 1984, NASA has collaborated with 15 international partners to build and operate the International Space Station (ISS). In the future, these collaborative efforts will accelerate with the demise of the Space Shuttle Program and decisions to extend the ISS‘s lifespan to 2020 or beyond. Thus, an important step in NASA‘s use of the study findings is to share them with other space agencies and technical organizations to provide the basis of a dialogue around such questions as: Do highly effective executives in other space agencies exhibit similar behaviors? Are some specific only to effectiveness at NASA? Might some of the behaviors be effective within NASA, but ineffective in the international arena or for other technical executives?

NASA has already taken steps to develop a 55-item questionnaire based on the observational study. The questionnaire is being piloted with the Project Management Institute‘s Global Executive Council. Ideally, NASA will then conduct the survey with

other groups of national and international technical executives, and complete a factor analysis to validate the six thematic categories. The end result would be an instrument to gather additional information and gain insights on technical executives' perceptions on what behaviors and attributes are important to their roles and what levels of proficiency they have reached.

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WHO CAN HELP US? CHALLENGES OF RURAL WOMEN NON-FARM ENTREPRENEURS IN NIGERIA

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ABSTRACT: In Nigeria, rural women entrepreneurial activities are being increasingly appreciated and documented. These activities have been known to have consequences on employment generation and poverty reduction. Nonetheless, the activities of these women are plagued by a myriad of problems, often resulting in slow growth, poor performance and business failure. This paper highlights the major challenges militating against rural women entrepreneurs in the study area. The paper further made pertinent recommendations regarding a framework for the development of rural women entrepreneurship in Nigeria.

Introduction

About 70% of the 1.3 billion people living on less than $1 per day are women (UNDP, 2001). In Nigeria, women occupy the lowest rung of the poverty ladder (Iheduru, 2002). A vast majority of these women live in the rural areas. A key element in the history of rural development in Nigeria is that agriculture has been viewed as a basis for rural development. This approach has excluded other sectors of the rural community from the policy framework of rural development. An important economic sector which has suffered tremendous policy neglect is the rural non-farm enterprise sectors which provide employment for over 50% of the rural people. Rural women are known to be major players in this sector. For instance, the contribution of Yoruba women to the development of the rural economy as tailors, food processors, traders, mat weavers, cloth weavers, soap makers, fabricators, etc. is increasingly been appreciated and documented (Soetan,1996). These activities have generally been known to be critical for employment, income generation and survival of their proprietors and families. The challenge however is to help these women entrepreneurs become successful, as there is evidence that the enterprises of many of them are generally characterized by slow growth, poor performance and business failure (Alimba, 2004). This paper is advanced to highlight the potential of rural women entrepreneurs in Nigeria and the critical challenges militating against them. The goal of the paper is to make appropriate recommendation towards a sustainable policy framework for the growth of rural women enterprises in Nigeria.

The Concepts of Entrepreneur and Entrepreneurship

There is no universally acceptable definition of entrepreneur and entrepreneurship. Schumpeter (1934), however, provides a framework for understanding the two phenomena in terms of processes. From Schumpeter's perspective, the term entrepreneur seeks to reform the pattern of production by exploiting an invention, an untied technological possibility for producing a new commodity or producing an old one in a new way or by opening up a new source of supply of raw materials or a new outlet for

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products. Entrepreneurship as defined essentially consists in doing things that are not generally done in the ordinary course of business routine.

From Schumpeter's description, it is clear that he did not equate entrepreneurs with inventors, suggesting that an inventor might create a new product whereas an entrepreneur will gather resources, organize talent and provide leadership to make it a commercial success. This view point was also corroborated by Peter Drucker, who described the entrepreneurial process as the gathering and using of resources in response to opportunities rather than problem to produce result. In Drucker's view, entrepreneurship occurs when resources are redirected to progressive opportunities rather than employing resources to ensure administrative efficiency. The role of redirecting resources distinguishes the entrepreneurial function from that of traditional management.

The concept of entrepreneurship has generated many definitions; however, to choose the definition of entrepreneurship most appropriate in the rural context it is important to take cognizance of the entrepreneurial skills that will be needed to improve the quality of life of individual families and communities and to sustain a healthy economy and environment. Therefore, entrepreneurship in the context of this paper will be defined as a force that mobilizes other resource to meet unmet market demands, the ability to create and build something from practically nothing, the process of creating value by pulling together a unique package of resources to exploit an opportunity, This is a combined definition of entrepreneurship by Jones and Sakong (1980), Timmons (1989), and Stevenson, et al. (1985). It is the dynamic process of creating incremental wealth. This wealth is created by individuals who assume the major risk in terms of equity, time, and/or career commitment of providing value for some product or service. The product or service itself may or may not be new or unique but value must somehow be infused by the entrepreneur by securing and allocating the necessary skills and resources.

The definition of an entrepreneur is as elusive as that of entrepreneurship. Identifying entrepreneurs or determining what they do has generated much controversy among scholars, policy makers, and other stakeholders. There are no universally acceptable guidelines for classifying entrepreneur and, according to Karl Vesper (1986) the nature of entrepreneurship is often a matter of individual and professional perception. Economists towing the line of Schumpeter perceive an entrepreneur as individuals who bring resources together in an unusual combination to generate profit. Psychologists from the view point of Vespar tend to view entrepreneurs in behavioural terms as achievement-oriented individuals that are driven to seek challenges and new accomplishments. Marxist theorists perceive entrepreneurs as exploitative adventurers representing everything that is negative in capitalism.

Corporate executives view entrepreneurs as small business owners who lack the potential required for corporate management. For Vesper (1999), on a positive note from the view point of market economy, entrepreneurs have been viewed as the pillars of industrial strength, the movers and shakers who constructively disrupt the status quo. In essence, the term entrepreneur may be applied to individuals who incubate new ideas, start enterprises based on those ideas and provide value to society based on their independent

initiatives. As such, any individual who fits this description is an entrepreneur irrespective of sex and location.

What is Rural?

In order to conceptualize rural enterprises, rural entrepreneur, and rural entrepreneurship, it is necessary to define the term ―rural.‖ Developing such a definition has been a conceptual problem for some time. According to Whitaker (1982), "rural" was first used by the U.S. Bureau of Census in 1874 when it was defined as indicating the population of a county exclusive of any cities or towns with 8,000 or more inhabitants. Blakely (1984), opined that the term rural can be characterized by simple life, agrarian, smallness, homogeneity, and dullness. In literature, rural is been increasingly defined by examining a broad categories of criteria. Deavers and Brown (1985) categorized rural areas based on social, demographic, and economic criteria. Economic categories include agriculture, manufacturing and mining; social criterion includes persistent poverty and deprivation, while demographic criteria include population distribution and migration rate. Horn (1985) looks at values, socioeconomic factors, political structure, locus of control, and priorities for schools. Croft (1984) suggests that an ecological approach comprised of cultural values, number of people, and ambiance can be used to work toward a definition of rural.

In an attempt to differentiate between rural and urban communities in Nigeria, Ekong (2003) identified twelve criteria in describing the extremity in the rural/urban poles. According to him, in contemporary Nigeria, a settlement may be regarded as urban not merely be cause of its statistically thick population but more importantly because of the presence of a number of basic cultural objects or attributes. These include ten or more post-primary schools; two or more modern hotels, two or more supermarkets; electricity supply, pipe-borne water supply, one or more industrial establishments employing not less than fifty people, two or more branches of commercial banks, police and fire services, entertainment and recreational facilities, nursery and day care centers, two or more petrol stations and two or more private clinics. From the view point of Ekong, any community that fails to meet the aforementioned criteria is regarded as a rural community. The Nigerian case, however, presents a situation whereby one can not describe rural and urban areas based on these extreme poles, there are many urban towns that do not meet many of these criteria, while a few rural communities may meet one or more of the criteria identified by Ekong. Noting these complexities, Ekong conceived rural urban situation in Nigeria as a continuum. For the purpose of this paper, the concept of rurality will be described in degrees from core rural to pure urban with semi-rural in-between. The core rural is used here to describe communities that are extremely cut-off from any form of civilization. They are devoid of a basic infrastructure such as electricity, pipe-borne water, telecommunications, etc. No form of federal or state presence can be seen in such communities. They are thinly populated with traditional mud brick thatched-roofed buildings, purely agrarian with pockets of agro-based non-farm enterprises. All characteristics highlighted by Blakely such as simple life, agrarian, smallness, homogeneity, and dullness are all found in this so-called rural community. At the other end of the pole, is the core urban which virtually lacks any of the features

highlighted by Blakely but possesses virtually all characteristics identified by Ekong as listed above. In-between the two poles are communities possessing many or few of the Ekong-identified criteria in different combinations. From the foregoing there is the need to take into cognizance the varied degree of rurality in designing a sustainable, need based and effective rural development policy.

Rural Entrepreneurship

Various conceptual issues characterize the literature on rural non-farm activities and rural income (Barrett, Reardon, & Webb, 2001), particularly the definitional dilemma. The literature on rural non-farm enterprises lacks a common definition. Barrett et al. (2001) lament that the lack of a standard definition limits effective comparative analysis, often leading to mistaken inference. The term ―non-farm,‖ ―off-farm,‖ ―non-agricultural‖ are often used in a synonymous manner by many authors. However, for the purpose of this study, rural non-farm entrepreneurial activities are defined as income generating activities other than crop production and animal husbandry engaged by rural dwellers. Rural non-farm enterprises account for 42% of rural household income in many developing countries such as Nigeria (Haggblade & Magistro, 2005). According to these authors, a rural non-farm enterprise houses a highly heterogeneous collection of agro-processing such as oil-palm processing, cassava processing, etc., trading, and service activities. Often highly seasonal, Reardon (2001) observed that rural enterprise activities fluctuate with the availability of raw materials and in rhythm with household labour and financial flows between farm and non-farm activities. The composition of rural non-farm economy varies considerably as a result of variation in natural resource endowment. In many developing nations such as Nigeria, Agro-processing accounts for more than 80% of rural non-farm activities.

Characteristics of Rural Women Entrepreneurs in Nigeria

A majority of rural women entrepreneurs are advanced in age. A study conducted by Soyebo (2005) and corroborated by Fayomi (2009) revealed that the mean age of rural women non-farm entrepreneurs in Osun-state is 50 years old. Youth are generally unattracted to most rural non-farm enterprises, a situation which has a serious consequence for the succession of such enterprises

- Most of the rural women enterprise operators are married. On the average, rural families maintain relatively large families. The average family size reported by Fayomi (2009) in his study on rural non- farm entrepreneurs is eleven people.
- Rural women entrepreneurs in Nigeria are generally characterized by a low level of education.
- Rural women entrepreneurs have strong entrepreneurial orientation; a majority have parents who own/owned their own businesses, while some actually inherited their parents enterprises. This probably account for the reason why they are able to thrive in spite of the unfavorable investment climate and low level of education and skills.

- Rural women entrepreneurs in Nigeria are characterized by low working capital outlay. A study conducted by Fayomi (2009) in Osun state reported an average working capital of nine thousand naira among the rural women entrepreneurs.
- The activities of rural women entrepreneurs is generally characterized by rudimentary technology and production processes
- Economic necessity is the major motivating factor for the participation of rural women entrepreneurs in non-farm enterprise activities.
- Agro-processing forms the major activity of rural women entrepreneurs in Nigeria.
- The rural women entrepreneurs are generally characterized by low level of business management skills.
- Sole proprietorship is the main form of business ownership among rural women entrepreneurs in Nigeria.
- The enterprises of rural women in Nigeria are characterized by slow growth.
- Rural women entrepreneurs are desirous of growth. They generally have a positive attitude to training.
- Rural women entrepreneurs are characterized by strong networks. A majority of them belong to one form of social organization or more.
- A majority of rural women entrepreneurs belong to one religious affiliation or another.
- Rural women entrepreneurs are characterized by lack of succession planning.

Policy Framework for Indigenous Entrepreneurship Development in Nigeria

The Nigerian government's policy of promoting entrepreneurship dated back to the early 1970s. Some of the past efforts of the Nigerian government in fostering the development of small industries as a policy strategy towards alleviating the problem of mass unemployment and poverty include the establishment of the National Directorate of Employment (NDE) in 1986, Work For Yourself Programme (WFYP) in 1987, Youth Employment and Vocational Skills Development Program (YEVSDP), better life for rural women by the then-Babangida military administration as well as the family support programme of General Sanni Abacha regime of 1990s. These efforts have really shown that Nigeria government has long conceived the idea of ―rural economic boost" as a strategy for the realization of national economic growth and development.

A number of Non-Governmental Organizations (NGOs) also arose to promote entrepreneurship development. Notable amongst them was the Country Women Association of Nigeria (COWAN), which contributed immensely towards women entrepreneurship development through organization of many cooperatives and micro-credit schemes, and in partnership with the United Nations.

It is very important to note here, however, that the potential of indigenous enterprises has not been optimally harnessed to realize the objective of socio-economic and political emancipation of rural dwellers in Nigeria. More importantly, there is no policy in place to address the sustainability of indigenous enterprises in a systematic manner.

Potential of Rural Women Entrepreneurs in Nigeria

Rural women non-farm entrepreneurship can play a potentially significant role in reducing rural poverty. Some of these potentials are highlighted below:

A study carried out by Reardon (1998) revealed that the typical rural household in Africa has more than one member employed in a non-farm enterprise, hence rural women entrepreneurial activities have the potential of generating employment opportunities in the secondary sector of the rural economy which will definitely reduce the unemployment currently faced by the Nigerian youth. This also has an important implication for the reduction of rural-urban migration with its corollary socio-economic problems such as urban congestion, prostitution and other associated social vices.

In Africa and many developing economies of the world, the average share of rural non-farm enterprise income as a proportion of total income is between 42-55% (Haggblade, Hazel, & Brown, 1987). Hence, rural women entrepreneurship activities have the potential to raise rural income thereby improving the living conditions of the women entrepreneurs and their households.

According to Gordon and Craig (2001), the activities of rural-nonfarm women entrepreneurs have the potential to absolve surplus labour in the rural areas, help farm-based household spread risks, offer more remunerative activities to supplement or replace agricultural incomes, offer income potential during the agricultural off-season, and provide a means to cope or survive when faming fails. Furthermore, Craig and Gordon (2001) highlighted the short-term potential benefit of rural non-farm women entrepreneurship to farm household food security by providing cash that enables a farm household to purchase food during a drought or after a harvest short-fall, thus serving as a source of farm household savings. Again, rural non-farm women entrepreneurial activities have the potential to enable a poor household overcome credit and risk constraints on agricultural innovation (Ellis, 1998). Moreover, rural women entrepreneurship has the potential of facilitating production linkages in the rural areas. These include forward linkages from agriculture to non-farm processing of agricultural raw materials as well as backward linkages to input suppliers of equipment, raw materials, and repair services (Berry, 1995).

Challenges of Rural Women Entrepreneurs in Nigeria

The greatest challenge for rural women entrepreneurs is inadequate finance. Women in non-farm enterprise activities need substantial finance both for start-up and expansion. The study conducted by Soyebo (2005) identified finance as a critical problem confronting rural women in the non-farm sector. This finding was also collaborated by Fayomi (2009).Although a number of financial intermediation opportunities have been introduced by successive Nigerian governments to foster the development of small businesses, financial constraint remains a serious problem militating against the success of rural women entrepreneurs in Nigeria. It has been difficult for women to raise external finances through commercial banks and other associated schemes because of the demand

for collateral. Currently, the Microfinance banks (MFB) are the government's latest major organ of policy for entrepreneurship finance in Nigeria. In an ongoing research conducted recently, it was discovered that male to female application and approval by MFB are in the ratio 65% to 35%. This discrepancy was linked to women entrepreneurs approaching banks on an individual basis sometimes lacking soundly written business plans and/or feasibility studies (Olutunla, 2008). The work of Fayomi (2009) revealed that in the core rural area of Osun State, none of the rural entrepreneurs interviewed have benefited from any micro finance scheme. Many are not even aware of the existence of such scheme.

Furthermore, rural women entrepreneurs are generally characterized by a low level of education and subsequently low level of business skills. As noted by National Economic Reconstruction Fund (NERFUND) enterprise management skills are still very deficient. Marketing and new market development skills are very low. This low level of entrepreneurial capabilities and skills has seriously limited the ability of rural women entrepreneurs to utilize the various opportunities and exploit the full potential of non-farm enterprises in Nigeria. A number of current training centers/programs are urban-based; for example, the Industrial Development Centres established in the 1960s are urban-based. The Small Medium Entrepreneurial Development Agency of Nigeria (SMEDAN) aimed at facilitating credit, technology markets, capacity building, training and technical support for SMEs and provided adequate linkages with women who are urban-based and starved of funds (Adereti, 2000).

In addition, rural women entrepreneurs are still constrained with limited resources in critical areas, the infrastructural constraints are inhibiting, the roads are generally bad, while public utilities are either non existence or irregular. Generally, the macroeconomic environment in Nigeria has not been all that favourable to rural entrepreneurship. New incentive scheme have not had their desired impact on the rural enterprise sub-sector. This is because of cumbersome administrative procedures and operations of the institutions which are to provide support services for effective implementation of such schemes. Generally, the incentive schemes provided under the industrial policies are not specifically targeted at rural non-farm enterprises. The rural women entrepreneurs are also faced with inadequate external exposure. Furthermore, rural women entrepreneurs, due to lack of exposure and financial limitations, still make use of rudimentary technology in production, thus leading to drudgery and low output. This also makes rural enterprises unattractive to the younger and upcoming generations, posing a serious succession threat to many rural enterprises. Moreover, in many cultures of Nigeria, women face a number of cultural restrictions; an example is the ―Kule" policy in the North where married women are forbidden from going out of the house in daylight for business. In Sub-Saharan Africa, including Nigeria, where women have prime responsibility for food production, they are generally limited to user rights to land and subject to the consent of a male relative (FAO, 1982). Culture and social practices discriminate against women to be enterprise successors/inheritors or own independent assets which could easily serve as collateral. Such unequal land rights are reflected in the smaller land sizes of women farmers thus limiting them economically. Also, there are certain myths about women in respect to credit which have caused them to remain poor

and limited in their entrepreneurial prospects. One such myth is that poor women make poor credit risks. This is being proved wrong as Olutunla (2008) reported that Nigerian women have been found to be more faithful in terms of loan repayment to Banks than men.

Conclusions

The importance of rural entrepreneurship to the development of developing economies the world over is increasingly being documented. The role of women as active participators in achieving sustainable development is also being increasingly appreciated by many governments of the world. An important sector where the contributions of women have been felt is the rural non-farm entrepreneurial sector. Extant literature on rural entrepreneurship revealed that women participate more in rural enterprise activities than their men counterparts. These activities have been found to have a strong correlation to rural household poverty reduction, employment generation, good childhood education, and enhanced conditions of living for rural dwellers. This paper was an attempt to highlight the potential of rural women entrepreneurs in Nigeria as well as the major challenges confronting them. In achieving this objective, the paper reviewed the concepts of entrepreneurship and entrepreneurs; rurality; rural entrepreneurship; rural women entrepreneurship; characteristics of rural women entrepreneurs, and the challenges of rural women entrepreneurship in Nigeria. In spite of the challenges confronting rural women entrepreneurs, there is ample evidence that their potential for economic growth and development is enormous and cannot be overemphasized. In essence, empowering rural women entrepreneurs is a viable and worthwhile investment into rural development and rural poverty reduction.

Recommendations

To foster the development of rural entrepreneurship and the empowerment of rural women entrepreneurs, the following recommendations are advanced:

- There is the need for a base-line survey of rural women entrepreneurs and there enterprises to be able to effectively accommodate them in a developmental policy framework. Currently most of the activities of rural women entrepreneurs are unrecognized in government official records as most of there enterprises are unregistered. Common facility centres where better adaptable technological facilities/machinery for the production of pre-dominant non-farm enterprise products should be provided in the core rural areas across Nigeria. This will reduce the hardship and drudgery associated with the traditional method of production and encourage more participation of the rural women as well as the younger and up-coming generation.
- An enabling investment environment, in terms of providing an infrastructure such as good road networks, electricity, etc., as well as gender-friendly policies, by the various arms of government, will go a long way in fostering further development of rural women entrepreneurship.

- Cooperatives and women trade groups formation should be encouraged to position women strategically to access funds and other developmental schemes with ease.
- Concerted efforts should be made to create the awareness of rural women entrepreneurs to available and government and non-governmental enterprise and rural support schemes. This could be done by making effective use of extension agents.
- Concerted efforts should be made to reduce the financial constraints militating against the success of rural non-farm enterprises. This could be done by ensuring that micro-finance initiatives reach the core rural areas of the nation. Furthermore, the gender main streaming clause of the micro-finance initiative should be enforced to the letter, undergirded with the background that women require a small working capital to operate with.
- Training programmes should be sponsored from time to time and extended to core rural areas to enhance the managerial skills and capabilities of rural women to start and run successful enterprises.
- Business advisory services should be made available to women entrepreneurs in the core rural areas to support their activities.

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THE BROWN CONCRETE CEILING: A LITERATURE REVIEW ON THE STATUS OF LATINA LEADERSHIP IN US UNIVERSITIES AND COMMUNITY COLLEGES

Tammy L. Rivera[1]

ABSTRACT: The purpose of this review is to examine literature on the status of US Latina leadership in higher education. There is a disproportionate underrepresentation of Latina leadership in higher education including both current and in-the-pipeline leadership despite their growing and projected numbers. In community colleges alone, only 26 or 2% of CEO's were Latina in 2006 and the majority of those were in Hispanic populated colleges (Muñoz, 2010). The prospects for the leadership pipeline look just as grim. Only 2% of Ph.D.'s were earned by Latinas in 2007(U.S. Department of Education, 2010). There is acute lack of research on this topic with only a total of five sources discovered. The sources included mixed method studies, articles and a conference paper. Overall, the literature review showed that the two primary sources have seven themes in common and one major difference. The secondary sources have four themes in common with each other and as a whole with the primary sources. The themes are indicative of the forces that come together to form a uniquely and extremely difficult ―brown" concrete ceiling for Latinas. The ―brown" concrete ceiling is a compounded result of race, gender, culture, and class that Latinas have to break through on a pathway to or as they hold leadership positions in higher education. This issue is extremely important as we consider the projected number of Latinas and their potential contributions as leaders.

Introduction

There is a disproportionate underrepresentation of Latina leadership in higher education, including both current and in-the-pipeline leadership, despite their growing and projected numbers. The total number of adult Latinas in the US in 2007 was 14.4 million or 6% of the adult US population (Passel & Cohn, 2008b).

In community colleges alone, which have the highest minority populations, there were only a total of 26 or 2% Latina CEO's of the 1,186 colleges in 2006 and the majority of those were in Hispanic populated colleges (Muñoz, 2010). The US Department of Education, National Center for Education Statistics (2010) reports the following distribution of executive/administrative/managerial positions in degree-granting institutions: white 80%, black 10%, Hispanic 5%, Asian/Pacific Islander 3%, American Indian/Alaskan 1%, and non-resident 2%.

The prospects for the leadership pipeline look just as grim. Holding a Ph.D. is critical to attaining top leadership positions in higher education and a master's degree is generally the gateway to a Ph.D. Only 2% of the Ph.D.'s and 4% of the master's degrees earned were by Latinas in 2007. The remaining Ph.D. degrees were earned by the following other populations along with their percentages: white males 25%, white females 32%, black males 2%, black females 4%, Hispanic males 2%, Asian/Pacific Islander male 3%, Asian/Pacific Islander female 3%, American Indian/Alaskan males 0%, American

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Indian/Alaskan males 0%, non-resident males 17%, and non-resident females 17% (U.S. Department of Education, 2010).

This problem does not allow for equitable representation of the current or projected population of Latinas; puts them at a disadvantage academically, which in turn puts them at a disadvantage economically; essentially excludes their prospective contributions to leadership; and is indicative of the forces that come together to form a uniquely and extremely difficult ―brown‖ concrete ceiling for Latinas. The ―brown‖ concrete ceiling is a compounded result of race, gender, and class that Latinas have to break through on a pathway to or as they hold a leadership position in higher education.

Scholarship

A literature review of this kind was not discovered. Literature on the topic of Latina leadership in higher education is almost nonexistent and significantly less than the topic of leadership in higher education as a whole. For instance, a search of books completed on both Latina and Latino leadership in higher education discovered one book. A search of books completed on leadership in higher education discovered 148 books.

Research Strategy

The purpose of this literature review is to provide insight on the status of Latina leadership in higher education and to examine the experiences and possible factors that advance or obstruct that leadership. After conducting a literature search, the resulting sources were grouped into primary sources and secondary sources. Primary sources consisted of literature narrowly focused on Latinas or Hispanic women in leadership in higher education. Secondary sources consisted of literature that combined both female and male, Latino or Hispanic, leadership in higher education. The literature was reviewed and analyzed in the separate groupings and as a whole.

Methodology

Literature Search

A literature review can serve to explore an area of research; analyze its content; identify commonalities, differences, and connections; and share those findings (Creswell, 2008). A general literature search of books, journals, and articles was completed through the University of Wisconsin – Milwaukee‘s (UWM‘s) electronic library and interlibrary loan system. Similar searches were conducted in ERIC, EBSCO, Wilson Web Education, and Women‘s Studies International. The reference sections of the sources selected were also searched for relevant resources.

The initial search was restricted to content that primarily focused on Latina/Hispanic women leadership in higher education from 1995 to present day. However, it yielded such dismal results, exactly two sources, that the search was expanded to include both female and male Latinos. Expanding the search towards the direction of Latinos instead

of other populations or topics, for instance, leadership of women in general in higher education, was chosen because Latinas identify stronger with their culture than with their gender. According to Valverde (2003) women of color place their race/ethnicity before their gender. This resulted in an additional three sources for a total of five sources. The sources consisted of one book, three articles and a conference paper. The largest search result listed ninety sources and the smallest was zero; however, the majority of the search finds were focused on other areas of leadership or education. Many of the search results focused on elementary education. The following terms were used in the searches: Latina leadership higher education, Hispanic women leadership higher education, Latino leadership higher education, and Hispanic leadership higher education.

Approach to Analysis of Data

The literature was divided in two groupings and analyzed in two layers. The primary grouping included the sources on the narrow focus of Latinas in leadership in higher education. The secondary grouping included the sources on Latinos as a whole and their leadership in higher education. The first layer of analysis consisted of identifying the commonalities and differences of the primary sources group. The second layer of analysis consisted of reviewing the secondary sources group and identifying any commonalities or differences with the themes of the first group.

Two techniques were used to analyze the information; wall mapping and concept mapping. In the process of wall mapping, main concepts from the readings were identified, labeled on to post-it notes, placed on a wall, and organized into similar concepts and categories. Themes and connections were then identified between sources (see Appendix A). In the process of concept mapping, the key components, content of each source and relationships were represented, categorized, and connections were drawn between sources onto a computer-based graphic organizer (see appendix B).

Results

Primary Sources

Muñoz (2010) conducted a mixed-method study using a survey for the quantitative portion, and for the qualitative portion conducted interviews regarding the participants' experiences. A total of 22 participants responded to surveys and, of those, 13 completed the interviews. Participants who met the criteria of being a Latina community college chief executive officer and who accepted invitations to participate, were interviewed. Seven areas were primary focus areas of the investigation including: career paths, early influences, external supportive forces, strategies to overcome challenges, influences that most impacted their success, and organizational impacts that hindered or supported their success. Personal context, professional preparation, professional context and challenges and the leadership pipeline arose as themes in its findings. Some key findings include that these participants are persistent in pursuing their goals; are much more formally prepared with credentials, training, and experience than men; trustees play a critical role in the selection process; leadership should be representative of and be prepared to lead the

growing and diverse population; and they face greater challenges than both men and their female white counterparts including issues of discrimination and equity that are compounded because of race, gender, and culture.

Gorena (1996) conducted a mixed-method study using a survey for the quantitative portion and open-ended questions from the survey to analyze the participants' experiences for the qualitative portion. Participants consisted of a total of 68 senior administrative Latinas in US higher education. The study was examined within the context of women in leadership in higher education as a whole. A profile of the participants was developed that focused specifically on the positive and negative factors to advancement.

Some key findings indicate that these Latina leaders have similar experiences to their other female counterparts with the exception of issues relating to culture. Among the positive factors uncovered were legislation, philanthropy and leadership training that have contributed to advancing progress of women in this arena. Most of the influences identified, however, were negative factors: discriminatory and equity issues, which are compounded for Latinas, and the issue of an inadequate pipeline, which is magnified in light of growth of diversity.

Muñoz (2010) and Gorena (1996), the two sources in the primary grouping, have several things in common and a difference. Their commonalities are that both are mixed method studies, whose participants are Latina leaders in higher education. Both studies also examined positive and negative experiences and factors of participants, and had seven major themes in common: (a) exceeding qualifications for their leadership roles; (b) discrimination and equity issues, (c) compounding impact of race, gender and culture; (d) difficulty from peers, (e) facing much greater challenges than their counterparts; (f) concerns regarding the leadership pipeline; and (g) an urgency to respond to changing demographics. The major difference is found in their assessment of institutional response as discussed in subsequent paragraph.

According to Ost and Twale (1989) private institutions hold more promise for women as leaders in higher education (as cited in Gorena, 1996). Munoz's (2010) presentation, however, shows the opposite for Latinas emphasizing that the majority of Latinas are in public institutions. Each has a different stance on institutional provisions to advance leadership. Gorena (1996) claims millions of dollars have been dedicated to the issue of women in leadership while Muñoz (2010) finds a lack of institutional response and support.

Secondary Sources

Valverde (2008) examined the experiences of current successful Latino leaders in higher education and incorporated his own experiences. The three areas explored were principles, successful practices and leadership qualities. Five of the seven themes from the primary groupings are found in common including discrimination and equity issues, peer problems, much greater challenges, concerns with the pipeline, and the need to

respond to the changing demographics. The two themes of the compounded issues of race, gender and culture and leaders being highly prepared did not surface.

Gutierrez, Castañeda, and Katsinas (2002) conducted a mixed-method study through a literature review, qualitative survey of career paths and a quantitative analysis of related statistics. A total of 26 participants of the National Community College Hispanic Council's annual symposium participated in the survey with 16 holding senior executive positions. Four of the seven themes from the primary grouping are found in common including: discrimination and equity issues, much greater challenges, concerns with the pipeline, and the need to respond to the changing demographics. The three themes of the compounded issues of race, gender and culture; peer problems; and leaders being highly prepared did not surface.

Santiago-Santiago (1996) conducted a review of demographic data on successful organizational strategies of three Latino higher education institutions. As with Gutierrez et al. (2002), four of the seven themes from the primary groupings are found in common including discrimination and equity issues, much greater challenges, concerns with the pipeline, and the need to respond to the changing demographics. The three themes of the compounded issues of race, gender and culture; peer problems; and leaders being highly prepared did not surface.

Gutierrez et al. (2002), Santiago-Santiago (1996), and Valverde (2008) comprise the secondary sources grouping. Collectively, they share four themes in common with each other and with the primary source grouping, with the exception of one additional item that arose in the Valverde source. The four common themes include: discrimination and equity issues, much greater challenges, concerns with the pipeline, and the need to respond to the changing demographics. The theme that was found in Valverde but not the other two secondary sources is peer problems. However, this is a theme shared with the primary sources.

Overall

Overall, the literature review showed that the two primary sources have seven themes in common and one major difference. The secondary sources have four themes in common with each other and as a whole with the primary sources. One of the secondary sources shared another theme in common with the primary sources that the other ones did not.

Discussion

Critical theory undergirds the discussion on this literature review, with an emphasis on Latina critical race theory. This framework was selected because of how heavily the four themes, found in common among all the sources, weighed into this theory. It is the lens largely espoused in the content. Numerous assertions are attached to that theory including the oppression of minorities, which can be noted as the overall theme of the study. (Delgado, 2001; Hardy-Fanta, 1993; Willis, 2007).

Critical Theory

Critical theory is defined by Willis (2007) as a ―... paradigm… not housed primarily in one particular social science, as behaviorism is in psychology. Instead, it is multidisciplinary… [with] movements in anthropology, art criticism, economics, education…" (p. 48). A central point of which is the addressing of social injustice by exposing the oppressive interests of those in power over those providing the labor and resources for that power in what seem to be neutral forms and forces of science, politics, and culture (Underwood, 1998, as cited in Willis, 2007). In education, critical theory has manifested itself in issues like the concern over the focus on program and classroom planning versus the examination of lack of access to education for some segments of our communities. Mirriam and Caffarella (1999) state that ―...critical theory remains a particularly important underpinning to theory building in adult learning… [and]… has also informed analyses of professionalization … and the dynamics of teaching and learning transaction." (p. 355).

Critical race theory calls to question the very foundations of order. It identifies several tenets including the ordinariness of racism or the way society does business as-usual; it is difficult to tackle and remedies only address blatant forms; interest convergence/material determinism ascends white over color interests advancing white elites materially and the working class physically so there is little incentive to eradicate racism; racism is a product of social thought and relations not biological; differential racialization is at play placing emphasis and blame on different groups at different times; intersectionality and anti-essentialism acknowledge that each culture has its own origin and evolving history; and the aspect of unique voice of color thesis that places people of color in a position to uniquely convey matters of race and racism with a presumed competence that whites are unlikely to know (Delgado, 2001).

Latina critical theory is the layering of Latina aspects onto critical race theory. This layering includes the intersection of race, gender, culture, and class. This phenomenon, in the same or in differing combinations, is also referred to as the Latina trinity of oppression. Hardy-Fanta (1993) stated that ―Latinas are portrayed as oppressed by race, sex and cultural tradition or being oppressed to the third degree…" (p. 19). Latinas are extremely underrepresented in formal leadership roles and disproportionally affected by typical inequites. This disproportionate inequity exists because of the compounding factors of racism, sexism, negative immigrant sentiments, and discrimination based on language (Hardy-Fanta, 1993).

Latinos as Minorities and Their Demographics

The number of Latinos, overall, and the corresponding numbers of Latinas is a substantial portion of the current US population. Latinos are the largest minority group. There are approximately 47 million Latinos, which are 15% of the population, and almost half of those are females/Latinas. Latinos are projected to be 29%, of the US by the year 2050 (Passel & Cohn, 2008a). If current proportions hold, Latinas, who make up half of that amount, will replace the current total of Latinos and then become 15% of the population.

The projected numbers of Latinas give even more reason to produce knowledge about the underrepresentation of this population, especially when you consider their leadership roles or lack of leadership roles. Latinas impact every sector of society both in the Latino community and the non-Latino community but their numbers re not reflected in leadership roles.

Economically, it is not equitable for Latinas to provide a substantial amount of the labor force and be excluded from the management and compensation that accompanies those roles. For instance, when we take a closer look into the economic realities, Latinas participate in the labor force at a rate of 59% but are only 5.7% of management and they receive even less pay, 35% less, than their non-Latina women counterparts, who are themselves not receiving equitable pay in comparison to men (Passel & Cohn, 2008b).

Latinas in the US are more severly disadvantaged than any other ethnic or gender population (Caiazza, Shaw & Werschkul, 2004; Ramirez & De la Cruz, 2003; as cited in Sanchez de Valencia, 2008). Poverty, criminal activity, and social ills are heightened when inequitable oppportunities & underrepresentation exist (McFarland, 2000, as cited in Sanchez de Valencia, 2008). More dependency and less regard for law and other social norms are created by poverty (Schwartz & Post, 2002, as cited in Sanchez de Valencia). A concrete ceiling exists for Latinas, which excludes their prospective contributions as role models and leaders. Intentional workplace discrimination further compounds this issue with Latinas reporting discrimination at a rate of 23% (Blumrosen & Blumrosen, 2002, as cited in Sanchez and Valencia, 2008).

Definitions

The term Latina/o and Hispanic are interchangeable. The term Latina refers to a female Latino/Hispanic. Latinas are generalized in this investigation but there are several different ethnicities within the culture including from distinct and different countries of origins; different generations in the US ranging from first generation immigrants to several generations in the US; differing levels of upholding cultural traditions; different socio-economic backgrounds; Spanish language proficiencies; etc. Additionally, the degree of authentic leadership grounded in Latina culture has not been studied and therefore is not defined, available, or present in this paper. In terms of this investigation the focus of leadership is on formal top executive leadership roles of Latinas described as the CEO, president, chancellor or similar positions. According to Yukl (1998) ―Leadership has been defined in terms of traits, behavior, influence, interaction patterns, role relationships, and occupation of an administrative position." (p. 2).

Limitations

There is almost nonexistent literature on the exclusive topic of Latina leadership in higher education. It is not possible to ensure that direct or indirect research was completed with Latinas/os as participants' self-identify. None of the sources have attempted to distinguish either the indigenous/authentic leadership of participants or the level retention of that leadership.

Critical Assumptions and Assertions

There is a world view and philosophic assumption arising from the review of this literature. The world view espoused in this analysis appears to be that the world should be an equitable place where inequities must be addressed. The philosophical approach accompanying that world view is that the interest of all is served better when there is inclusion of all segments of our populations and they are represented in leadership roles. It could be argued that there are several assumptions in this literature review including: that education has a responsibility to social justice and equity; and that underrepresentation is a problem in and of itself.

Conclusions

It is evident that Latinas are underrepresented in higher education leadership. That underrepresentation has been attributed to issues primarily addressed in critical theory.

Implications

The body of literature is acutely minimal in regards to this issue. Concluding the search for literature, it was clearly and critically obvious that there is a lack of knowledge on the topic of Latina leadership in higher education and foundational knowledge is critically needed in this area. The Latina population holds great potential for the adult education arena as they are a large and growing market for students, staff, leadership, and scholars.

Recommendations from Literature

Numerous suggestions have been made and successful models/practices shared in the literature examined. The most notable response is to approach the issue of underrepresentation with a critical perspective. To this end, it is urged to continue to both look at and respond to issues raised about the lack of Latina leadership in higher education through a critical theory lens. Foucault (1973), states that work in this area can —... serve as both counter knowledge and liberating tools for people who have suffered (and continue to suffer)…" (as cited in Ladson-Billings, G., 2000, p. 257). Brookfield (2004) offers a list of seven crucial tasks in a critical approach to adult learning that could be applied including: perceiving and challenging dominant ideology, unmasking powering, contesting hegemony, overcoming alienation, pursuing liberation, reclaiming reason, and practicing democracy.

Many of the sources seem to direct a leader to the use and need for transformational leadership. In addition, the complexity of the urban adult education institution and the dynamics exposed in the reading requires a more holistic and multi-faceted approach much like reframing organizations (Bolman & Deal, 1997). To use Affirmative Action as it was intended, and to educate all involved of its original purpose and continued value, can be a solution to ensure equity and develop the succession pipeline, mentors, etc. and eventually an increased presence of Latinas in leadership.

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Appendix

Appendix A: Wall Mapping
Appendix B: Concept Map

Appendix A: Wall Mapping

Appendix B: Concept Map

Concept Map: Literature Review on Latina Leadership in US Higher Education
by Tammy L. Rivera (2010)

JAMAICA'S BLEACHING STORY: LEARNING TO NEGOTIATE SOCIAL CAPITAL AS AN ADULT

Petra A. Robinson[1]
Mary V. Alfred[2]

ABSTRACT: The legacies of slavery and colonialism are well documented in postcolonial and social sciences literature. Importantly, the oppressive and dominant nature of slavery and colonialism taught racial and social discrimination in various ways. Within the context of Jamaica, a small island nation with a history of colonialism and slavery, Eurocentric values, including light skin color as an indicator of beauty, sits within a space of privilege. This paper explores how Jamaicans perceive light skin color as a form of social capital, how their history influences this perception, and how stratification based on skin color continues to be an indicator of social class on the island. It describes efforts to negotiate, manage, and attain this social capital, particularly evidenced by the practice of skin bleaching. Through skin bleaching, individuals seek to improve beauty and obtain this capital (light skin) and make efforts to convert it to other kinds of capital and, thus increase social standing and other opportunities.

Perceptions of Skin Color

Inasmuch as people are classified based on the degrees of pigmentation in their skin, so are certain stereotypes and social stigma attached according to skin color or shade. For hundreds of years, blackness was associated with things unnatural and with extreme ugliness. In 1910, Putnam (as cited in Gergen, 1967) wrote, ―The black man is something apart--something untouchable" (p. 393). Jordan (1968) described the initial English confrontation with Africans and stated, ―White and black connoted purity and filthiness, virginity and sin, virtue and baseness, beauty and ugliness, beneficence and evil, God and the devil" (p. 7). Additionally, Hunter (2007) noted,

> The maintenance of white supremacy (aesthetic, ideological, and material) is predicated on the notion that dark skin represents savagery, irrationality, ugliness and inferiority. White skin, and thus whiteness itself, is defined by the opposite: civility, rationality, beauty, and superiority. These contrasting definitions are the foundation for colorism. (p. 238)

These oppositional associations conjure up very vivid images of good versus bad and continue even until today. Being white continues to signify wealth; being brown initiates perceptions of privilege and being black, the opposite―poverty and negativity.

In a recent study investigating the connotations of English color terms, Allan (2008) hypothesized,

> Among Anglos, white is associated with purity and light, freedom from malignity or evil intent and this with the beneficent, the innocent, the harmless. This is

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strongly motivated by its contrast with black… Thus to be white was a compliment and the attribution of darker hues was dysphemistic. (p. 636)

The level to which a black person experiences negative stereotypes according to these connotations is often attributable to their shade of complexion or skin tone.

Further, these negative connotations may lead to feelings of inferiority and internalized self-deprecation. The literature on mental illness among Negroes, according to Gergen (1967), records many instances of recurring dreams with the desire to be white. He stated, ―Such patients believe that they are really white, but that their skin is dirty, dyed, or painted" (p. 399). Lind (1914) posited, ―Some even think that they have eaten foods that caused their skin to darken. . . ." Other investigators have found that Negroes' self-esteem may be greatly impaired as a result of such feelings, and that accompanying self-hatred may be generalized to hatred for the entire Negro race" (as cited in Gergen, 1967, p. 399). Self-hatred is among a plethora of reasons put forward to explain the bleaching phenomenon. Hall (1995) calls this feeling towards dark skin color disdain and suggests African Americans build up disdain because it is ―an expression of dominant culture ideals" (p. 173). Essentially, the dominant culture dictates the beauty ideal (whiteness) and members of the colored community are striving to distance themselves from the ugliness of blackness and integrate themselves into what is perceived as beauty. ―Beauty is typically defined in the United States, and increasingly around the world, by whiteness and Western-European features" (Hunter, 2005, p. 27). Skin lightening therefore becomes an obvious tool in the quest for this beauty and assimilation into the mainstream.

W.E.B. Dubois, a black sociologist, offered an idea in 1903 called ―double consciousness" in which he suggested African Americans battle with attempting to endure or to assimilate in two distinct worlds: one world is white, the other is black. This assimilation influences blacks to ingest the negative connotations and stereotypes against their race. ―African Americans have internalized light skin as the ideal because they were powerless to contest the influence of domination" (Hall, 1995, p. 176). While this may seem historical, there are instances of cultural domination where blacks continue to remain powerless. Certain structures exist in today's societies that promote cultural domination on a wide scale. In Jamaican society, the battle in Jamaica referred to as the case of double consciousness, like the United States, presents itself as a clash between the Eurocentric (white colonialist and imperialist) principles and Afrocentric (black) ideals.

With an overwhelming bias towards white or European culture, Paul (2009) explained,

> The bleaching or whitening of official Jamaican culture away from its African origins persists today and manifests itself in all sorts of ways from actual skin bleaching to the seamless assimilation of colonial norms, values and practices on the part of the middle and upper classes. (p. 96)

Within the black community, skin tone is important in defining beauty (Hunter, 2002; Wolf, 1991); lighter-colored skin for a long time has been and still is typically seen as more beautiful than darker-colored skin.

The privileging of light skin over dark skin is particularly true and impactful for women because as Hunter pointed out ―light skin color works as a form of social capital for women. Women who possess this form of beauty (capital) are able to convert it to economic capital, educational capital, or another form of social capital" (2005, p. 37). The value of this kind of beauty (light skin), as a form of social capital has caused the practice of skin lightening to become increasingly popular as a means of improving beauty and, thus, increasing opportunities.

In the Caribbean, race is not the primary indicator of social status, nor has it been the primary source of privilege after colonialism. Skin color and stratification according to skin tone have historically had a significant correlation to social class. As early as 1949 skin color was identified and documented as the determinant of class in Jamaica (Henriques, 1949). In discussing the issue of colonialism and the importance of skin color as a determinant of social class, Sherlock and Bennett (1998) stated,

> The basic colonial principles were: the doctrine of the superiority of the white race and the inferiority of the black. Europe was civilizer and Africa was savage. Skin color was a badge of status, with blackness denoting slave labor and the gradations of color moving downwards to degradation. (p. 12)

The idealization of the European image was legitimized as early as 1814 when Oliver Goldsmith (as cited in Jordan, 1968) explained,

> White was the natural color of man; after all, children everywhere were born fair. The variations of the human figure and color are actual marks of degeneracy in the human form; and we may consider the European figure and color as standards to which to refer all other varieties and with which to compare them. (p. 248)

There is a need for closer attention to the problem of discrimination related to skin color stratification and colorism within communities of color. Hall (2005) explained the centrality of skin color in the context of an African American‘s life and indicated that skin color ―helps define and determine their reality not irrelevant to but beyond the effect of race" (p. 125). Colorism is important and pervasive enough that it deserves greater attention and scrutiny along with the consideration given to racism.

According to Freeman, Armor, Ross, and Pettigrew (1966), ―color-sensitive" Negroes in the United States often repeat the adage ―If you‘re white, you‘re right; if you‘re brown, stick around; if you‘re black, step back!"(p. 365). The idea of describing a population of Negroes as color sensitive as well as the expression quoted echoes some measure of the complexity and challenges faced by non-white people. The adage articulates long-standing perceptions about the distinct stratification associated with skin color in the United States as well as in the Caribbean.

Slavery, Colonialism & Skin Color

Slavery and colonialism promoted the ideas of white superiority and black inferiority (racism) through much of the Western world, including the colonized countries of the Caribbean. Williams, Lavizzo-Mourey, and Warren (1994) explained, ―The concept of race and its associated racist beliefs developed in the context of slavery and imperial colonialism" (p. 27). Further, colonialism and slavery also used various mechanisms to encourage the intra-racial hierarchical structure in which skin color/shade takes on certain connotative meanings; lighter colored skin is desirable and considered ―fair" and darker colored skin is less desirable. Race, then, was for categorizing as well as rationalizing the mistreatment of the colonized (Williams, Lavizzo-Mourey, & Warren, 1994). Skin color provided the ammunition for the weaponry of racism and color stratification in the colonized nations.

Herring, Keith, and Horton (2004) presented the idea that, when it comes to skin color stratification during slavery, colonizers instituted a social system by systematically dispensing workload according to color. Those for outside labor were dark-skinned and those who were light-skinned assumed jobs inside the plantation masters' homes. A social order among slaves evolved and the house slaves were believed to have experienced favorable treatment over the field slaves. This social order served to create division and animosity among the slaves, much of which was based on skin complexion. Graham (1999) further commented,

> As the caste system among slaves was gradually instituted by slave owners and their families, the slaves themselves came to believe that one group was, indeed, superior to the other. The plantation owners began to place their lighter skinned slaves in the house, thus creating an even greater chasm between the two groups-- now based on physical characteristics, not just random assignment. Because these lighter-skinned blacks were perceived as receiving greater benefits and a more comfortable lifestyle, resentment among the darker-skinned field slaves only grew. (p. 6)

Resentment and social distinction between these groups increased as slave masters engaged in forced sexual relations with female house slaves.

As the offspring of white masters and black mothers, the children became slaves of even lighter complexion. These mulattoes and other lighter-skinned slaves expanded the distance between themselves and the darker colored field slaves. Frazier (1957) noted, (as cited in Loury, 2008), ―The mulatto was conscious of his relationship to the master race and generally felt himself superior to unmixed Negroes. The lighter skin color generally involved certain advantages that confirmed this feeling of superiority" (p. 428). Today, the issue of skin complexion furthers the distance or stratification throughout the Caribbean and society as a whole.

Slavery and colonialism taught social discrimination between darker members of the same race; the battle wages on between both the Afrocentric and the Eurocentric cultures

in Jamaica. Within this struggle people of color, particularly with darker skin complexions, are victims of a set of structures within society that support and enable colorism. Hall (2008), in underscoring the severity of the situation, posited, ―The most potent problem for people of color in the post-colonization era has perpetuated a status hierarchy that is based on their ability to idealize light skin" (p. 238). Further, he commented on how skin color ―continues to correlate with a lack of economic and political power in post-colonized nations where the West has had considerable impact in establishing the genesis of light skin as the ideal of superiority all over the world" (p. 239). Light skin, also called fair skin, enjoys a positive image and perception all over the world.

Within the context of Jamaica as a postcolonial nation with a history of colonialism and slavery, Eurocentric values, including light skin color as an indicator of beauty, sits within a space of privilege. Preference for Eurocentric values abounds and it is perpetuated through many areas of social life, including religion, education, popular culture and media. The resulting effect is an affinity for, and the desire to attain, light skin color. Indeed, light skin color is a key indicator of beauty and social capital or social standing. For some, skin bleaching has become the method through which light skin becomes possible.

The Skin Bleaching Practice

Inescapably linked with the problem of colorism or discrimination in relation to color is skin bleaching. Having established light colored skin as the ideal model of beauty, people of darker skin tones are engaging in the process of skin bleaching, in an attempt to attain lighter skin tones. Essentially, there is preference among blacks for more stereotypical European standards of beauty and attractiveness supporting the skin bleaching practice.

In a quantitative study using a sample of African-American college freshmen, Hall (2006) formulated hypotheses to assess the extent of the way in which light skin has evolved as ideal, and by inference, the Bleaching Syndrome. The study included 200 African American full-time freshmen at a historically Black college in the United States and the hypotheses were formulated with the purpose of providing an objective standard for investigating the issue of light skin among black people indicative of the Bleaching Syndrome. The findings revealed that there is a ―statistically significant relationship between self-identified skin color correlated with light skin" (p. 26). The results of the study suggest that the value of light skin could be attributed to the perpetuation of the Bleaching Syndrome.

Skin bleaching is a dangerous phenomenon occurring all over the world; Glenn (2008) in testifying to the dominance and significance of colorism, highlighted the extensive growth of the use of skin-lightening products globally. The practice of skin bleaching is not new; however, the desire and fervency is disturbing. Tied to the problem of skin color discrimination, the problem of skin bleaching does not lie far from slavery and its legacy; its prevalence indicates that it is not a distant or historic problem. In effect, the creation of a social stratification or skin color hierarchy remains a constant and viable force of

discrimination against people with darker skin tones. Bleaching in Jamaica is increasing in popularity and acceptance among the population. With this dangerous trend, the authorities in Jamaica's health sector began to take notice and action. The Ministry of Health (MOH) is the pre-eminent Government organization mandated to care for the nation's health.

Charles (2003) highlighted, ―The issue of bleaching has received widespread coverage in the media… [and refers to] the views of columnists and letter writers to the newspapers as instructive" (p. 716). The MOH continued its efforts against the bleaching phenomenon, and in February 2007, initiated a five-month island-wide campaign called ―Don't Kill the Skin." The government health officials, on the offensive, sought to continue the attack against the practice by using various media to communicate the message to the public. In fact, Brown-Glaude (2007) indicated that the ―goal was to reduce the practice of skin bleaching by confiscating illegal products from streets and hosting a series of lectures to educate the public of the dangers of this practice" (p. 34). She examined the Don't Kill the Skin Campaign, organized by the Ministry of Health, under the context of the bleaching phenomenon as a social problem.

Throughout the research literature, several reasons are put forward for the bleaching phenomenon that Hall (1995) refers to as the bleaching syndrome. He suggested that much of the bleaching syndrome is the desire to assimilate wherein ―some people of color exhibit a willingness to tolerate the racist denigration of dark skin that has enabled the Bleaching Syndrome" (p. 236). Additionally, research shows that people's judgment about others is influenced by skin tone and that darker-skinned individuals are seen as less intelligent, trustworthy, and attractive than lighter-skinned individuals (Herring, Keith, & Horton, 2004; Hunter, 2005; Maddox, 2004). Bleaching, then, to achieve the idealized lighter skin tone may be an option for many.

In the January 22, 2007 editorial of Jamaica's oldest daily newspaper, *The Daily Gleaner,* the editor presents an opinion on the reasons for the bleaching crisis by stating,

> The reasons for the use of these products by Jamaican women of African descent are deep and complex, having to do with the sociology of slavery, the continuing relationship between race and power, and notions of beauty. The assumptions are that beauty is not obviously black; although, in the context of Jamaica, and perhaps the rest of the English-speaking Caribbean, it is not overtly Caucasian and aquiline. Something in between translates in Jamaican parlance to 'browning', the mixed-raced person legitimized by beauty contests and endorsed in popular culture. (*Jamaica Gleaner*, 2007)

This message presents similar arguments related to the hegemonic and discriminatory practices related to skin color. It, however, introduces the role of the media and popular culture in perpetuating the idealization of light skin and its superiority over dark skin tone. This is significant because colorism can influence life chances and perceived self-worth and attractiveness (Fears, 1998), thereby having a direct relationship with the skin bleaching practice.

Access to Skin Bleaching Products

Another contributing factor to the bleaching phenomenon is the easy access to skin lighteners. As Hunter (2008) pointed out, the creams used in the skin bleaching practice are called many things: ―skin lighteners, skin whiteners, skin toning creams, skin evening creams, skin fading creams, and so forth" (p. 73). Within this globalized society, the production, marketing and distribution of these skin lighteners form part of what Glenn (2008) terms a ―multi-billion-dollar global industry" (p. 283). The large industry, she suggests, is a dynamic network of both formal and informal elements on a transnational scene, made up of various types of corporations. The skin lightening industry serves various markets and its providers include large multinational corporations, small entrepreneurs, petty traders and even illegal smugglers. Procuring skin lighteners today is a relatively easy task, particularly with the advent and use of the internet.

Hunter (2008) comments on the concept of ―exporting the color complex," in which she posited,

> Globalization, multinational media conglomerates, and the new restructured world economy all work together to export U.S. cultural products and cultural imperialism. Part of this structure of domination is the exportation of cultural images, including images of race. The United States exports images of the good life of White beauty, White affluence, White heroes, and brown and Black entertainers and criminals. As many people in other countries yearn for the ―good life" offered in the United States, they also yearn for the aesthetics of the United States: light skin, blonde hair and Anglo facial features. (p. 73)

Jamaica, with its close proximity to the United States and easy access to mass media from the United States, is not exempt from this ―importation." Indeed, bleaching is thriving worldwide and is popular in the Third World, post-colonial countries. According to Hunter (2008), chemicals bleaching is trendy in countries such as ―Mexico, Pakistan, Saudi Arabia, Jamaica, Philippines, Japan, India, Tanzania, Nigeria, Uganda, Kenya, Ghana, and less so but also in the United States. These products are everywhere and easy to get" (p. 73).

Despite banning certain skin lighteners in Jamaica, including Neprosone Gel, Hyprogel, Dermo Gel Plus and Movate along with hefty fines for illegal sale of banned skin lighteners, products are reportedly still available. As part of the government's ―Don't Kill the Skin Campaign in Jamaica," Charles (2009) indicated that the police made attempts to confiscate illegal bleaching products that were being marketed in very inconspicuous places such as restaurants. The confiscated bleaching products included creams, Topsone Gels, Lemonvate, Omic,Movate, Top Extra Gel, Prosone and Regge Lemon. Additionally, Ritch (1999), a columnist for *The Daily Gleaner,* explained that *homemade* skin lightening products are popular and easily made. In fact mixing peroxide, baking soda or toothpaste, with lemon, Dermaclear, Nadinola and Topiclear, and curry powder, is thought to make the skin color of face even more attractive. Hunter (2008) commented

on many ―old wives tales" with recipes for skin bleaching, and emphasized that after the Civil Rights Movements and cultural pride movements of the 1960's and 1970's, bleaching became less acceptable. Further, however, ―outside of the United States and in many post-colonial nations of the Global South, skin bleaching is reaching new heights" (p. 73). The ease with which these products may be acquired presents many challenges for authorities who seek to control or curtail the practice of bleaching. It presents major concerns for the health practitioners who come in contact with bleachers and are charged with treating the skin diseases associated with the use of these bleaching creams and homemade concoctions.

Skin bleaching, despite the associated dangers, is increasingly appealing and popular as a practical tool for achieving light skin color, attaining the ideal kind of beauty and negotiating social positioning and indeed social capital.

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SOCIO-CULTURAL PRACTICES AND NON-FORMAL TRAINING OF YOUNG WOMEN TOWARDS ENTREPRENEURSHIP AMONG THE YORUBA OF SOUTHWEST NIGERIA

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ABSTRACT: This paper examines various cultural values among the Yoruba of South Western Nigeria and the resultant effects on forms of entrepreneurship training available for their young women non-formally. The Yoruba race is well –known for its esteem of women. Its civilization has produced several breeds of women from warrior queens to ideal homemakers. Within this line, there have been records of great female farmers, traders and rulers. The Yoruba have a long tradition of women involvement in the cottage and small business enterprises. The paper focuses on the effect of socio-cultural value and practices such as ethnicity values, mentoring of young women, and introduction of the girl-child to business, cottage businesses networking, social interaction, and initiation patterns into heredity businesses, language usage and modalities on the young women in the society. With the growing unemployment rate among the youth in the Southwestern Nigeria, it is pertinent to examine the cultural values and practices of the people so as to establish the fact that there are forms of non-formal traditional and cultural training for entrepreneurship for economic empowerment. Using historical and focus group discussion approaches, the paper reveals that cultural values wield enormous influence in the lives of the individual and the society at large. The application of this influence can positively affect the young women for entrepreneurship. The paper concluded that realizing the significance of cultural values and practices in the promotion of the entrepreneurial spirit among young women, such desirable culture should be encouraged to thrive among the Yoruba.

Introduction

In some cultures in Nigeria, like the Yoruba, Bini, Igbo, and Hausa, women are expected to take care of all domestic functions and maintain the husband and children, and to some extent be responsible to the extended family (Ehigie & Idemudia, 2000). The Islamic religion that is most prominent with the Hausa culture, for instance, does not allow the woman to be seen outside her residence. Most traditional social norms only permitted women to focus on family needs while allowing men to give primary attention to work. However, the Yoruba women are known for their active involvement in entrepreneurial activities.

With regard to the pre-colonial era, there is a great deal of information on the economic activities of Yoruba women. Accounts of travelers like Clarke and the Lander brothers reported that Yoruba women were active entrepreneurs. This has also been collaborated by oral traditions available in many Yoruba cities many of which describe Yoruba women entrepreneurs as shrewd business women. Different reasons account for the involvement of the Yoruba women in the pre-colonial era. Most times it is a form of supplementing the income of their families. History had it that most of the popular Yoruba women that attained political stardom like the legend Madam Tinubu of Lagos and the Iyalode of Ibadan, Efunsetan Aniwura were entrepreneurs involved in large scale

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farming with retinue of slaves, servants and foreign labourers called the ―Agatus‖ and traders in various forms of goods. This commercial activities brought them great wealth and enormous political influence in their generation.

In the colonial period, the Yoruba women became involved in planting, cropping and selling of various cash crops like cocoa, palm oil, kola nuts, and timber.

In the post-colonial period, the Yoruba were among the first tribe to accept the acquisition of western education for their girl child. The embracing of western education for the girl child brought in the trend of the negative perception of non-formal enterprises as ―below statuesque.‖ The enterprise culture of the Yoruba women, however, is fast eroding. This brought about considerable decrease in the percentage of women in the commercial sector. This was well aided by the oil boom and unfavourable government policy towards entrepreneurship. It was considered ―decent‖ for a woman to have a white collar paid job while self employment was seen as less sophisticated. In a study conducted in year 2007 among female undergraduates of a Nigerian University, a majority opted for paid job over self employment despite their awareness of the unemployment situation in the country. They did not consider entrepreneurship as a viable career option. Rather, they perceived it as mal-employment or under employment. This study therefore looked into the cultural values of the Yoruba in Southwest Nigeria and the ways in which these values prepare and train their young women for entrepreneurship and how the practice of the values in the modern Yoruba society can provide established alternative employment scheme for the young Yoruba women in face of the prevailing economic situation of Nigeria.

Objectives of the Study

The objectives of this study were:

1. To identify socio-cultural practices and values that aid enterprise culture among the Yoruba
2. To establish how such values are perpetuated from generation to generation
3. To make appropriate recommendations vis-à-vis the promotion of enterprise culture among young Yoruba women.

Literature Review

Roles of Women in Household Income Generation

Presently, both men and women are being integrated into the economy of the household with high dependence on each other's labour for their livelihood. Women entrepreneurial activities have been known to have a positive impact on the reduction of gender discrimination and economic disadvantage such as poverty and its consequences. Furthermore, the role of women entrepreneurs in employment generation and income distribution is being increasingly recognized (Simeon-Fayomi, 2008).Women entrepreneurs have a massive potential which has yet to be unleashed, not only due to the

gender gap, but also because women bring in diversity to the innovation process. Among practices that can help the development of women entrepreneurship include changing mindsets, adapting policies to allow better family life and work balance by using specific instruments like tax regulation, allowances and leave provision.

Udegbe and Omare (1994) suggested that women's experiences are probably different from those of their male counterparts at work. Women are increasingly getting involved in businesses and contributing financially to household requirements, in addition to their traditional roles as housewives. The extent to which wives are able to cope with these multiple role demands is likely to be a significant factor in their personal adjustment at work (Ehigie, 2000). Ehigie (1997) opined that with the fear that women's work will lead to a decline of housework as an occupation, people now opt for women to engage in less demanding occupations, especially non-career occupations like business, where they could have more control of the work situation. Nye (1963) found limited, but consistent, support for the assertion that divorce and separation tend to be more prevalent in homes where the mother works full-time. All these contribute to the stressful situations women face, especially the stress of simultaneously attending to both occupational and marital needs.

Women's Situation in Present Economy

The dual labor market theory argues that the labor market is divided into two separate markets: the primary market consisting of jobs with career prospects, high wages and stable employment; and the secondary market whose jobs are dead-end, low paid and with poor prospect. Research evidence shows that women are over-represented in the secondary market (Smith & Ward, 1984). Loveridge and Mok (1980) suggest that women comprise an 'out group' and are treated as such, and form the basis of an industrial reserve providing the source of additional labor when society requires it. This might explain why husbands would prefer their wives to go into small-scale businesses rather than engage in more formal jobs, as reserve for the provision of additional revenue for the family.

Moreover, Simeon-Fayomi (2008) asserted that most of the self-employed small-scale business operators in Nigeria are women. These women are mostly made up of those that have minimum formal education. The educated young Yoruba women preferred paid jobs which is more acceptable in the modern culture. These jobs are however not available to them. The reason for this is not far fetched. The paid employment sector exhibits high preference for men who would not need to take maternity leave or get involved in the traditional roles of women. There is also the general belief that absenteeism from work is more common among female workers who are responsible for taking their sick children to hospitals or who stay at home to nurse them. All these are part of the socio-cultural factors that load women with an unfair share of the responsibility of child rearing. The need for an alternative mode of action for the empowerment of the young Yoruba women has therefore become imperative.

Conceptualizing Entrepreneurship Education

Entrepreneurship has been variously defined. When rooted in solid learning theory, entrepreneurial education develops entrepreneurs by increasing business knowledge and promoting psychological attributes associated with entrepreneurs (Krueger & Brazeal, 1994). According to Kourilsky (1980), the supply of entrepreneurs can be increased by developing a positive perception about the feasibility and desirability of entrepreneurship through educational preparation at an early age. There is a well-established body of literature related to the effects of entrepreneurial education and venture creation on the development of youth. First, there is the body of research on the psychological characteristics associated with entrepreneurship (Krueger & Brazeal, 1994). There is also the learning theory associated with the programme content and the pedagogy of entrepreneurial development programmes (Leitch & Harrison, 1999). Again, there is empirical evidence supporting entrepreneurship education as an interventional tool for imparting adult attitudes towards entrepreneurship (Ede, Panigrahi, & Calcich, 1998).

 Hatten & Ruhland (1995) suggest that identifying and nurturing potential entrepreneurs throughout the education process could achieve long-term economic benefits . Specially, a venture support system based on entrepreneurship education designed to stimulate and facilitate entrepreneurial activities could result in lower unemployment rate, increased establishment of new companies, and fewer failures of existing businesses. Entrepreneurship can also be an important component of economic strategies for fostering job creation (McMullan & Long, 1983). More specially, effective entrepreneurship education prepares young people to be responsible, enterprising individuals who become entrepreneur or entrepreneurial thinkers and contribute to economic development and sustainable communities. Gasse (1985) recommended that entrepreneurial potential should be identified and developed at the secondary school level when the possibility of self employment as a career option is still open.

Cultural Values and Entrepreneurial Mind Setting

Culture and Entrepreneurship: What is culture? A variety of definitions of culture exists. Hofstede (1991, p. 5) defines culture as ―the collective programming of the mind which distinguishes the members of one group or category of people from another.‖ This definition may be applied to different levels of analysis, including the level of the family, ethnic group, firm or other organization and society or nation. Culture is intangible and largely unobservable as it can only be studied through various verbal and nonverbal manifestations from which constructs are inferred (Hofstede, 1980, p. 14). Culture is a highly complex phenomenon, including both deeply embedded values and manifestations that are more at the surface and consequently more observable.

Values are the most deeply embedded manifestations. Hofstede (1980, p. 18) defines values as ―a broad tendency to prefer certain states of affairs over others.‖ Rituals, heroes and symbols are more outward directed manifestations. For a better understanding of the concept of culture it is necessary to make a distinction between culture and personality. The latter refers to the individual and encompasses personal traits, originating from

genetic inheritance and individual experiences, as well as values that are for a large part shaped by cultural influences. In contrast, culture is restricted to collective, often normative, 'mental programs'. There is an ongoing debate among psychologists as to what extent culture and personality can be considered independent and distinct variables, and to what extent they are 'mutually constitutive', i.e., integral parts, as articulated by Church (2000, p. 681), who propagates an integrated cultural trait psychology perspective. This means that he argues that mental programming is partly unique for individuals and partly shared with those who belong to the same culture.

Values. Hofstede (1980) stresses that mental programmes that are passed on from one generation to another are resistant to change. Invariably, values change slowly. He emphasizes that the stability of cultural patterns can be ascribed to ―reinforcement by the institutions which themselves are products of the dominant value systems" (p. 233). These institutions ―include the family, education systems, politics and legislation" (Hofstede, 1980, p. 22). The process of cultural change in society can be demonstrated by focusing on the changing value systems.

Rise in self-employment. Although culture is slow to change, entrepreneurial activity may create its own feedback cycle, slowly moving society to a more entrepreneurial culture. In regions or countries with a high density of entrepreneurial activity, examples of successful new venture creation offer role models people can conform to: "If he/she can do it, I can" (Veciana, 1999, as cited in Audretsch & Thurik, 2002, p. 63). This is a ―demonstration" principle: the more entrepreneurs, the higher the possibility of increase in entrepreneurship. When there is more exposure of people to entrepreneurship, the higher the acceptance of entrepreneurship as an alternative to wage-employment and the higher the likelihood of other people becoming self-employed.

Culture and entrepreneurship. At the level of more deeply rooted values the following values are found to be important for entrepreneurship: the value placed on independence and autonomy in the workplace, tolerance for inequality of income and wealth and the (absence of) stigma attached to those whose entrepreneurial initiatives fail

In a study by Noorderhaven, Wennekers, Hofstede, Thurik, & Wildeman (1999), for instance, it was seen that the expected profits of self-employment appear to be a significant pull factor for entrepreneurship. Invariably, it can be concluded that culture plays significant roles in the cultivation of entrepreneurial attitude within a community. It is therefore important to study the values of the Yoruba people vis-à-vis the influence it has on their enterprise culture especially as it relates to their young women.

Methodology

The paper used historical and functional approaches. In conducting this study, the qualitative and participatory methods were adopted. The author collected relevant literature .Elder in Ile – Ife and environ were randomly selected for interviews. Using a structured interview guide, relevant information was elicited from elder Yoruba women

entrepreneurs. This served as the primary source of information. Related information was also collected from secondary sources such as books, journals and the Internet.

Socio-Cultural Values and Practices Promoting Entrepreneurship among the Yoruba Young Women

Various socio-cultural practices and values identified will be discussed under the following captions:

Ethnicity Values / Language Usage and Modalities

The Yoruba have a very rich oral tradition. Their language contains their values and their belief. One of the modalities in which they project such values in language use is through their wise sayings which are known as Proverbs. Proverbs are seasoned philosophical thoughts that reveal and explain the beliefs, values and ideas of a people (Wolfgang, 1999). There are many proverbs that relate to entrepreneurial characteristics and principles. Those principles resonate with contemporary entrepreneurial principles and promote entrepreneurial culture as in modern study of entrepreneurship. Examples of such use of proverbs are found in teaching risk bearing principle, diligence, promoting self of employment, optimism, business start up principles and business supervision and control. Samples include the following. The Yorubas discourage risk aversion and fear. This is evident in some of their proverbs which teach boldness in the face of challenges and risk. One of such is ―Bi mo le ku kin ku lo nso lomo okunrin da Lagbara" ki nma ku kin nma ku lo nso lomo okunri dole" (―If I must die so be it, is what a powerful man, the fear of death is what make a lazy man..) Diligence is one of the core principles of entrepreneurship. Yoruba culture and tradition frowns passionately on laziness while encouraging hard work, resilience and perseverance. This principle is thought and perpetuated through the use of relevant proverbs. One of such is the saying that ―Igbe ki ni ngo je sun ni m pole" (The cry of what shall I eat for supper is what kills a lazy man). The lazy man in this context engages in lamentation and dies in hunger rather than engaging in gainful employment. Another proverb relevant to self employment says ―Ise ree omo alase je, owo re omo alase la" (Paid employment can only guarantee subsistent living, great riches only come through industry). The Yoruba elders believe that personal involvement is critical to the success of any business concern. A number of proverbs teach and advocate this. One of such is ―A kii fi oju oloju sowo ka jere". (One does not trade with other people's eyes and make profit.) The proverb teaches the fact that nobody can represent well enough the interest of the entrepreneur. It is essential for the business owner to attend himself to his business if he must succeed. This language modal should be encouraged by the usage in daily affairs in the modern Yoruba society.

Mentoring Of Young Women and Social Interaction

Learning to acquire vocational skills took the forms of matercraftsperson versus apprenticeship guild process. For example, a child grows to be nurtured and tutored by his/her parents and the immediate family members as well as the community people, who would jointly impart to him/her the knowledge of how to behave and adequately integrate

into the society as part of the process of growth and development (Buraimoh, 2008). Mentoring is perceived as a highly skilled and delicate duty among the Yoruba. Skills such as carpentry, weaving, food processing, art of traditional medicine and blacksmith are acquired together with moral training; good attitudes and social etiquettes are acquired as the mentoring progresses.

The completion of the training most time signifies the end of the preparation period and signals entry into the highlight of the society. Coupled with this, is the societal norm of gerontological observation. This is the age–group relationship and observant of due respect on the basis of chronological age. Society uses this method to build the self esteem of everyone without biases for wealth or position. This cultural value promotes the cultivation of one of the essential attributes of an entrepreneur.

The similitude of the mentoring method can be found in the curriculum of some disciplines in higher education. These areas include medicine, education, engineering and law practice. Nonetheless, a vast majority of graduates of such disciplines still go in search of paid employment with little or no consideration for self-employment. This suggests that there is a missing link in the curriculum that should foster the entrepreneurial spirit as in the cultural value. Given this situation, there is the need to extend thorough monitoring programme to all levels of formal education. Young women should be exposed to business to bridge the learner's world of theory and practice. This could entail attachment to real businesses by inviting practitioners to class settings to reiterate the process of respective discipline. Successful women entrepreneurs who will serve as real models for the young women should be involved in the mentoring process,

Introduction of the Girl-Child to Business Networking, Self-Reliance Training and Initiation Patterns into Heredity Businesses

The Platform for Action created at the Fourth World conference in Beijing 1995 included in its strategies improvement of the situation of women and girls in every country and their access to support programmes that will enhance the self-reliance of groups of women so as to enable them to obtain and retain employment. The Yoruba culture has already embedded in it such support programmes for their young women especially.

In most part of the Yoruba land, some businesses are feminine–operative. Examples are hair-weaving, local goat marketing, soap making, clothing weaving, etc. Such businesses are handed down from generation to generation. It is comparable to ―cult-trading‖ method. These businesses cannot be learnt by outsider or people that are not related to the family. The motive is to empower the womenfolk from each family background so as to aid their financial independence to a reasonable degree. Food processing businesses generally are associated with the women in Yoruba land. It is an orientation towards entrepreneurship. The girl-child is initiated as soon as possible into the hereditary business. By the time she become a young woman, she would have enough mastery to stand and practice the business on her own. By the time she is getting married, she is given a portion out of her mother's business as a ―take off grant.‖ She is expected to do the same for her girl child. In modern Yoruba society, this custom can be perpetuated if

the girl child can be exposed to vocational and business training early enough through the curriculum of formal education.

Motherhood Obligations

The Yoruba girl-child is exposed to child-caring at every early stage. The girl-child is expected to help her mother nurse all younger children. She is also saddled with household chores. This is a way of instilling responsibility, accountability and thoughtfulness which are essential ingredients of business success. Moreover, the need to assume duties as the home manager, provider of needs, help giver and first aid health supplier, involve her having to provide financially for her home. Her ability to bring money home translates to better livelihood for members of her family. The Yoruba woman is well aware of these roles and obligations. To preserve this cultural value, the modern Yoruba woman must allow her girl-child involvement in this form of training. Also, the active role of ―house helps and housemaid‖ must be deemphasized in order to give adequate room for the girl child participation in the household.

Opportunity Recognition Training

The Yoruba enterprises are very flexible in nature. Particularly, women entrepreneurs are known to change their business easily. This may be due to the seasonal production of crops and goods and the conditions that prevails during those seasons. The Yoruba woman entrepreneur easily adapts to ranges of business associated with each other. The palm oil producer easily turns to the seller of palm chafes, palm brooms and woven palm baskets in the market place. This attribute of opportunity recognition is very essential for the development of an active entrepreneur.

Traditional Financial Support

There are different forms of financial/support systems in the Yoruba culture. The most common of those financial supports is known as the ‗Esusu.‘ It is a common traditional financial system in the rural areas in the southern Yoruba speaking part of Nigeria. The system is known for its low defaulter rate attributed to the social pressure from members against defaulting and in cases of default, the unconventional ways of recovering loans through sureties. This is a rotating savings and credit system. Members save up to three months and will then qualify for inclusion in the cooperative. The ―Esusu‖ groups in the community are most times formed by women who bring in their female children as they reach maturity. This system provides an avenue for the acquisition of start-up capital for new businesses. It is worth noting because they are targeted most time towards women. The revitalization of this traditional micro credit method in the indigenous roots will provide a financial services delivery system to a modern society. This is line with the Beijing Declaration no35.

Conclusions

From the foregoing, it is evident that Yoruba womenfolk have a sound entrepreneurial principle and orientation which they have been able to perpetuate and teach by articulating them into their socio-cultural practices and values which is being passed on from generation to generation. The dominant strategy of perpetuating this culture is by exposing the girl child until she reaches the stage of young adulthood to the practice and process of such values. These have reinforced and sustained the entrepreneurial spirit among the Yoruba women down from ages.

These values, if revived and articulated into girl child upbringing, will go a long way in developing entrepreneurial culture thereby reducing the incidence of female graduate unemployment in Nigeria.

Furthermore, to promote the enterprise culture in Nigerian tertiary institutions, more emphasis should be on the practical aspects of the respective disciplines with their commercializable areas.

Lastly, the government can exert influence on entrepreneurship in different ways: directly through specific measures and indirectly through generic measures. For example, when stipulating a competition policy, the government can influence the market structure and (indirectly) the number and type of entrepreneurial opportunities. Moreover, it is generally accepted that policy measures can influence the level of entrepreneurship. The government should therefore aid the development of entrepreneurship through the promulgation of policies and laws. It should be gender-sensitive policies and programmes, including development policies and programmes, designed, implemented and monitored, with the full participation of women, effective, efficient and mutually reinforcing at all levels that will foster the empowerment and advancement of women. This will eventually bring about the following statement, as advocated by the Beijing Declaration and Platform for Action (1995), article 16, resulting from the Fourth World Conference on Women: Action for Equality, Development, and Peace, held in Beijing, China during 1995.

> 16. Eradication of poverty based on sustained economic growth, social development, environmental protection and social justice requires the involvement of women in economic and social development and equal opportunities and the full and equal participation of women and men as agents and beneficiaries of people-centred sustainable development.

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WHAT THEY WORRIED ABOUT?
VOICES FROM ADULTS AT THEIR LATER LIFE

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ABSTRACT: In the program planning literature, one of the most discussed topics is needs-assessment. Although the definition and way of knowing are ambiguous, there are enduring and standard steps of assessment. Needs are defined as a discrepancy between learners' current state of knowledge, performance or attitude, and the desired status. To determine the discrepancy or gap, planners must collect empirical evidence. The needs assessment process is usually the first step in program development. The purpose of the study was to report senior's needs based on problems they perceived. Five hundred fifty (550) seniors were selected randomly by researchers. The major reported troubles of the seniors were health conditions (51%), psychological and social adjustment (20%), child problems (10%), economic conditions (6%), self-nursing and living (5%), education and entertainment (1%), family support (1%). Problems that seniors want to solve the most are health conditions (21%), economic conditions (15%), self-nursing and living (15%), education and entertainment (8%), family support (7%), psychological and social adjustment (5%), child problems (3%) accordingly. The problems that the seniors perceive, however, might not be the problems that they want to solve the most. The study does not report senior's problems thoroughly; however, it reveals some critical problems of the seniors which need to be taken into consideration when planning programs for seniors.

Introduction

At the end of September, 2010, the population of Taiwanese people aged of 65 or above had reached 2,478,811(DGBAS, 2010), which is about 10.67% of the entire population. Predictably, by the year of 2018, the society will officially enter into the ―Aging Society‖ where the population of seniors will reach 14% of the entire population. In the year 2025, the number of seniors in Taiwan will exceed more than 20%. The issues of the ―Aging Society‖ become very crucial and significant since more and more aged people appear in society; therefore, it is important to pay more attention to the topics of an aging population

It is a mutual process for all human beings to go through an aging period. Seniors' health conditions, attitudes, thoughts, relationships with others, living style, and economic plasn are different from people in other age groups; therefore, finding out the differences between old and young has become a valuable research field for scholars. According to previous research, seniors can keep their conditions healthy and positive through continuing learning (Henry, 1989; Laanan, 2003; Klein, Council, & McGuire, 2005).

However, according to a survey done by Ministry of Interior in 2005, no more than 3% of the seniors still participate in learning. Seniors show no interest in continuing learning for several reasons, including weak memory, lack of information on senior institutions,

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useless learning content, and tedious learning courses, etc. (Chung, Huang, & Wei, 2008). The Social Welfare Administration surveyed the seniors three times in 2000, 2002, and 2005, respectively (MOI). The survey focused on whether the seniors were aware of their social welfare and social rights. More than 50% of the seniors who completed the survey indicated that they were aware that the senior centers/classrooms, known as Chung-Ching Shue Yuan in Taiwan, are offering seniors' learning opportunity; however, less than 3% of seniors showed interest in participating.

According to analyses by researchers and scholars, the reason why seniors show no interest in participating in continuing learning is because they do not think what they learn will be beneficial in their lives. Needs assessment is more complicated than one can imagine. This paper examines the needs of seniors based on the issues they encounter on an everyday basis.

Purpose

This study focused on seniors' needs from their perspectives. We needed to first find out what was troubling and bothering the seniors; second to compile and gather the problems that seniors want to solve the most. Based on these data researchers and policy makers can be more familiar with seniors' issues; thus, prepare better and more useful resolutions for them.

Literature Review

Recently, 37 different senior needs assessment reports were gathered in a previous study (Wei &Tsai, 2008), from which we learned that seniors' individual needs are highly related to their backgrounds. One of the most important and consistent needs was medical insurance. Findings revealed that many senior services recipients might not necessarily be the ones who need it, while many seniors who actually needed the care did not get the service. Taiwan's system on the matter of seniors is complicated and scattered; as a result, seniors do not know how to seek out help when they actually need it.

Combining different sources and information about current seniors and analyzing the problems from various aspects such as economical, and political points of view and social class, we can conclude that seniors' needs are influenced by the circumstances they face in their lives--for example, how to predict chronic disease, how to solve medical problems, how to live their lives without income and pension, how to find a part time job, how to communicate with their family and relatives, and how to get along with other seniors in the community.

The needs of seniors vary due to different cultural and personal backgrounds. After analyzing eight different reports, we discerned five major needs for Taiwanese seniors, as listed in Table 1.

Table 1

Summary of Major Needs Perceived by Seniors in Eight Key Reports in the Literature

	Year	Subject	Needs（Numbered according to the needs）				
			1*	2	3	4	5
Zhou, Hui-ling	1985	Taipei, 65-year-old，Sample, 274 seniors (Survey)	Wish to live with family	Wish to be taken care of by family	Wish to participate in community event	Wish to have medical insurance	Wish to gain economic support
			90.2%	86.9%	50.8%	43.8%	37.0%
Tsai, M. H.	1993	Review of 66 articles (secondary data analysis)	Medical Insurance	Domestic nursing and care	Continuing learning	Entertainment	Income
Ministry of the Interior	2000	6,297 people aged 50years and above (Survey)	Medical Insurance	Financial Aid	Entertainment activities	Medical care institute	Consulting
			72.0%	70.0%	52.0%	32.0%	29.0%
Chang, Jer-Hung	2001	Taipei county seniors	Financial Aid	Free injections	Free health check	Lessen medical care fee	Free transportation
			78.8%	69.8%	69.0%	68.9%	60.1%
Ministry of the Interior	2002	5,441people aged 50years and above (Survey)	Free health examination	Aid for lower income senior	Aid for lower income senior with serious health condition	Elderly people living alone service	The elderly protection emergence line
			62.4%	57.1%	35.3%	29.4%	25.1%
Yang Yu-jay	2003	King-Men seniors 65 years and above	Domestic medical care	Senior consulting	Medical service	Financial aid	
			65.0%	57.5%	48.0%	14.0%	
Hsieh, Deng-Wang & Chen, Fen-Ling	2005	790 Tau Yuan county seniors aged 65 years old and above (Survey)	Financial Aid	Medical service	Entertainment		
			20.5%	17.9%	12.9%		
Ministry of the Interior	2005	5,815 people Aged 50 years old and above (Survey)	Welfare Allowance	Hospitalization allowance for middle and low income seniors	Live alone seniors caring and service	Living allowance for middle and low income seniors	Protection of seniors abused
			76.3%	74.9%	71.4%	69.9%	69.7%

This inquiry was undergirded with a literature review, which revealed that seniors' major needs are medical care, economic need, domestic care, and entertainment. Our previous

research efforts were based mainly on our investigation; therefore, it was somewhat limited by seniors' extent of literacy and questions designed by the survey. In this study, we asked for seniors themselves to answer questions in short essay forms, or they were interviewed by researchers if they could not write the answers or they did not like to write.

Method

This research is based on the ―Senior's Living Issues and Needs" questionnaire which was designed by the researchers and investigates seniors 65-year-old or older. Convenience samples were selected which included 550 seniors in Taiwan. The method of coding consisted of English letters and numbers. English letters are the questions in the survey, and the numbers after the letters represent the respondent being interviewed or surveyed; for example, A001 represents the first respondent's response to the first question. If a respondent had more than two missing responses, then the questionnaire was considered to be invalid. At the end of the survey, all data were entered into Excel and the analysis run.

Results

Background Information on Respondents

Our research subjects were mainly female (55.6% female and 44.4% male). The average age was approximately 73.8-years old. The levels of education were divided into seven groups: Illiterate level (20.0%), elementary school level (25.5%), junior high school level (12.4%), high school level (15.8%), vocational school level (12.0%), college level (9.6%), and graduate school or higher levels (1.6%).

The living style of the respondents can be sorted into three groups: living alone (13.8%), living with family (77.3%), and living in the senior center (7.6%). The majority live with family, mostly with second generation family and couples. Most of the seniors' living expenses derive from their current income (4.5%), previous savings (21.6%), pensions (21.2%), other family members (32.2%), government aids (18.9%), and insurance (1.1%).

Table 2 (continued on following page)

Background Information of Respondents

Basic Info	Item	Times（People）	Percentage（%）
Gender	Male	244	44.4
	Female	306	55.6
Age	65-69-year-old	183	33.3
	70-74-year-old	143	26.0
	75-79-year-old	113	20.5
	80-84-year-old	64	11.7
	85-89-year-old	31	5.6
	90-year-old above	16	2.9
Education Level	Illiterate	110	20.0

	Elementary	140	25.5
	Junior high	68	12.4
	High school	87	15.8
	Vocational School	66	12.0
	College	53	9.6
	Graduate school above	9	1.6
	Others	13	2.4
	Missing values	4	0.7
Living Style	Living Alone	76	13.8
	Living with Family	425	77.3
	Living in Senior Center	42	7.6
	Missing values	7	1.3
Living Expense Sources（Multiple choice）	Current income	36	4.5
	Pension	172	21.6
	Financial Aid	169	21.2
	Family Support	257	32.2
	Savings	151	18.9
	Insurance	9	1.1
	Missing Values	4	0.5

Seniors' Eight Major Troubles

The major troubles of the seniors are health conditions, economic conditions, education and entertainment, self-nursing and living, psychological and social adjustment, family support, child problems, and a category called ―other problems."

Health condition. At least 282 (51.3%) seniors perceive that they have this type of problem, mainly developed from chronic disease, degeneration of teeth, weakness of digestion, worsened eyesight, weakness of hearing, breaking down of bones (osteoporosis), increase of sleeplessness, lack of memory, diabetes, high blood pressure, and arthritis, etc.

> *My health condition is not good. I need to take medication for high blood pressure everyday. I go to the doctor very often with my daughter. It's a great pain for me. (A149)*
> *Bad memory, osteoporosis, worsened eyesight, teeth problems. (A035)*

Economic condition. Thirty-one seniors indicated that they have economic worries including lack of opportunity to work, low-paid salary, loan, and other expenses.

> *My work pay is getting lower and lower, I am afraid that I cannot afford my future expenses. (A119)*

Education and entertainment problems. This type of concern and worry appears the least among all problems. Only three seniors think that continuing learning and daily entertainment somehow affect their lives.

My learning ability is declining; I cannot follow up whatever is new in the society. I feel very left out. (A518)

Self-nursing and living problem. Twenty-eight seniors showed concerns on the matter of self-nursing and self-living. Seniors worry about their daily meals, nursing service, and living environment, etc. Due to the inconvenience of senior's mobility, seniors feel like they need extra assistance and care in their lives.

I have to make my own meals, or sometime eat out, but it's very inconvenient for me. (A402)
My mobility is worse than ever, so it's very inconvenient for me to cook and eat out; therefore, it has become a trouble for me. (A806)

Psychological and Social Adjustment. About 110 seniors indicated that they have the problem of accommodating social environment and living style. Seniors sometime feel it is hard to blend into the society; as a result, they become more lonely and isolated from others. In addition, some of the seniors feel like they do not see a purpose of living; thus, they often think that they are useless in the society.

I'm lonely sometime, and it's hard to tell my children something about my feeling and affections. (A026)
Due to my children's work, we cannot get along often, I feel lonely sometime. (A138)

Family Support. Only three seniors think that there are problems between mother and daughter-in-law.

Child Problems. About 10.0% of seniors indicated the existence of child problems. Seniors worry about their children's work, health, living style, relationship, and marriage, etc.

I am worried about my children's working condition, and whether they are doing fine. (A904)

Other Problems. Three seniors indicate the problems of sharing the heritage among children. Three seniors indicate the problems of public security and safety. Some seniors need to take care of their grandchildren; therefore, they do not have their own leisure time.

Table 3 (continued on following page)

Seniors' Troubles

Seniors' Troubles（n＝550）							
Item	Health Condition	Economic Condition	Entertainment	Domestic Nursing	Psychological and Social Adjustment	Family Support	Child Problem
Total	**282**	**31**	**3**	**28**	**110**	**3**	**55**
(%)	**51.3**	**5.6**	**0.5**	**5.1**	**20**	**0.5**	**10**

Gender							
Male	125	15	2	12	47	1	18
Female	157	16	1	16	63	2	37

Age							
65 to 69	75	12	2	6	33	0	25
70 to 74	82	8	0	5	33	1	14
75 to 79	64	9	1	11	26	2	10
80 to 84	34	2	0	3	9	0	4
85 to 89	22	0	0	2	4	0	1
90 & Older	5	0	0	1	5	0	1

Education Level							
Illiterate	65	5	0	5	25	1	12
Elementary	72	15	0	9	27	0	24
Junior High	34	4	1	2	18	0	5
High School	44	4	0	5	16	0	4
Vocational	31	2	0	4	11	0	4
College	21	1	2	2	11	1	3
Graduate	5	0	0	0	0	0	0
Other	9	0	0	0	2	0	3
Missing Value	1	0	0	1	0	0	0

Living Style							
Alone	39	5	0	10	28	0	4
With Family	213	25	3	12	77	3	47
Senior Center	26	1	0	6	5	0	1
Missing Value	4	0	0	0	0	0	3

Living Expense Sources (Multiple Choice)							
Current Income	16	10	0	0	4	0	9
Pension	90	7	2	10	31	1	10
Financial Aid	102	12	1	9	41	1	13
Family Support	134	10	1	12	51	2	32
Savings	73	11	0	6	35	2	15
Insurance	0	0	0	0	2	0	1

Problems that the Seniors Want to Solve the Most.

According to the study, problems that the seniors want to solve the most are health conditions, economic conditions, education and entertainment, self-nursing and living, psychological and social adjustment, family support, child problem, and other issues.

      Health Conditions. There are 115 seniors (20.9%) that feel incompetent due to their degenerated health condition. They want to alleviate their chronic disease and maintain their body in a good condition, so that they can live better on their own. For example, seniors with in good health can travel around the world, participate in community events, live independently, and lessen children's burdens.

> *I wish my arthritis can cure soon, so that I can travel around freely. (B385)*
> *If I were* [to] *have a healthy body then I* wouldn't *need other people to worry about me. (B661)*

      Economic Conditions. Eighty-three seniors (15.1%) are worried about the price inflations; they are afraid that their current savings will not be able to sustain their future expenses. They wish to have income or increase their income.
> *The price inflation makes me worry about my future spending. (B035)*

      Education and Entertainment. Forty-three seniors (7.8%) reflect the importance of learning events, entertainment activity, and recreation facility. They wish to gain more current knowledge by participating in various events; moreover, they expect to have a more systematic and well-developed transportation system.

> *There is nothing to do besides watching television for us seniors. (B381)*
> *If there are more buses and transportations, then it will be so much easier to go shopping. (B412)*

      Self-Nursing and Living. Eighty-two seniors (14.9%) wish to have someone that can assist and take care of their living such as dish washing, clothes washing, and house chores.

> *It is hard to live in Taipei such a busy city, it's so crowded and the rent is so high. (B571)*

      Psychological and Social Adjustment. Twenty-nine seniors (5.3%) wish to meet new friends and have someone that they can talk to whenever they are bored and lonely.

> *It is so lonely to eat alone. (B233)*

      Family Support. Thirty-seven seniors (6.7%) want to solve the domestic troubles such as the issues between mother and daughter-in-law, the problems within family members, and the problems between couples.

> *Sometime I got into fight with my children because of different thoughts toward things, besides this there aren't other significant problems. (B038)*

Child Problems. Eighteen seniors (3.3%) are worried about their children's future, marriage, relationship, and living style. Some of them even have concerns for their grandchildren's growth.

> *I hope my daughter can get married soon and have a happy family. (B269)*

Other Issues. Other problems that the seniors want to solve include the safety of the community and the society.

Table 4 (continued on following page)

Problems that the Seniors Want to Solve the Most

The Issues (n＝550)							
Item	Health Condition	Economic Condition	Entertainment	Domestic Nursing	Psychological and Social Adjustment	Family Support	Child Problem
Total	**115**	**83**	**43**	**82**	**29**	**37**	**18**
(%)	**20.9**	**15.1**	**7.8**	**14.9**	**5.3**	**6.7**	**3.3**
Gender							
Male	50	37	17	40	10	10	5
Female	65	46	26	42	19	27	13
Age							
65 to 69	35	37	17	16	7	14	9
70 to 74	34	15	13	18	13	8	5
75 to 79	23	23	9	28	3	10	3
80 to 84	15	6	2	11	3	3	0
85 to 89	7	1	2	5	1	2	0
90 & Older	1	1	0	4	2	0	1
Education Level							
Illiterate	25	23	5	24	9	8	3
Elementary	33	29	5	20	6	16	7
Junior High	12	9	8	8	7	5	4
High School	16	15	8	13	3	4	2
Vocational	14	3	7	7	3	1	1
College	11	4	9	9	1	1	0
Graduate	0	0	1	1	0	1	1
Other	4	0	0	0	0	1	0
Missing Value	0	0	0	0	0	0	0

Living Style							
Alone	12	10	2	21	8	10	1
With Family	90	68	40	49	19	24	15
Senior Center	13	3	1	10	2	3	2
Missing Value	0	2	0	2	0	0	0

Living Expense Sources (Multiple Choice)							
Current Income	7	9	2	5	3	3	3
Pension	36	14	23	21	9	5	3
Financial Aid	41	31	11	39	15	7	4
Family Support	53	36	18	32	11	23	10
Savings	35	19	10	15	12	22	5
Insurance	2	1	1	1	4	2	0

Discussion

What bothers seniors the most are their health conditions, psychological and social adjustments, and child problems. However, problems that seniors want to solve the most are a bit different than what bothers them the most. Problems that they want to solve other than health conditions and child problems, are economic problems and living arrangements, accordingly.

The results of our research are consistent with research done by the Ministry of the Interior in 2005. A majority of the seniors, regardless of gender, worry about their health condition more than anything else, more than their economic condition and domestic care if they are not physically healthy. In addition, the older the seniors are, the more they worry about their living arrangements and environment, especially seniors who live alone or seniors aged 75 years old or above. Lastly, seniors, under age of 79, care about their continuing education and entertainment more than other seniors.

In this research, more than 70% of the Taiwanese seniors live with their family and most of their daily expense is supported by their family members. Seniors who live with their family usually feel lonely and often worry about their children's marriage, work, and grandchildren's education.

This research does not reflect seniors' thoughts and wishes thoroughly; however, we learned that the older the people are, the more problems they will encounter. Seniors' living conditions and problems are critical topics for us to think about and find the most adequate solutions, so that we can make our seniors' lives and living quality better than ever.

Conclusion

In conclusion, problems that often occur when people grow old are health conditions, economic sources, family relationships, living arrangements, and domestic care. The Taiwanese government has been paying much attention to the issues of senior's medical service and private care recently. The government has also been planning to provide long term care for seniors. Even though this plan has not yet been accomplished, the government has invested much effort in these ten years to make our seniors live better and healthier. We not only need to provide our seniors better living quality, but we also need to find out what is the best solution for the growing number of seniors. Continuing to supply seniors with outside resources sometime does not solve the internal problems. The best way to improve seniors' living quality is to teach them how to face certain critical problems, encourage them to be aware of their health condition earlier, and instill them with current and useful knowledge.

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(Key words: needs assessment, seniors' problems, seniors' learning program)